



## **A POWERFUL ALLIANCE TO IGNITE YOUR SUCCESS**

Experience freedom and total support through Raymond James Advisor Select.

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**RAYMOND JAMES**



## Everything you want – and then some.

At Raymond James, we believe advisors really can have it all. It's in that spirit that we created Advisor Select, an independent employee affiliation that gives you complete access to everything our firm has to offer and the freedom to use it as you see fit.

Structured to give you the control you want without relinquishing the benefits of being an employee, Advisor Select enables you to run your operations through our robust resources and extensive support. Ultimately, our mission is to give you more time to focus on what matters most: caring for your clients and growing your business.

With Raymond James Advisor Select, you'll find more than freedom and more than full support. You'll have true partnership.

### FUEL YOUR ENTREPRENEURIAL SPIRIT

Ready to amplify your success by building on ours? Begin by reviewing the qualifications for Advisor Select:

- A minimum of three years' experience
- \$2 million in annual branch production
- A core producer at President's Club level or equivalent

Once you confirm your eligibility and officially become part of our platform, you'll enjoy an array of far-reaching benefits, including:

**Consistent and transparent payouts:** As part of our advisor-centric culture, we'll provide you with a competitive, straightforward payout structure based on your business mix and production. Additionally, your branch will incur no ticket charges.

**Control over profit and loss:** As branch director, you'll manage the operating expenses of your branch and have full control over your profit and loss statement. Want to upgrade your team's equipment or provide year-end bonuses ahead of the holidays? Go ahead – it's your decision.

**Desired branch location:** You know what your practice needs to be successful, so you'll choose your branch's location as well as the look, feel and character of your office. Once you select your desired location, you will negotiate lease terms and expenses directly with the landlord. To further assist you, we can connect you to our national real estate brokerage firm to weigh in on lease rates.

**Dedicated personnel and staffing:** Hire and manage your own support team with the assistance and guidance of Raymond James Human Resources for all things personnel, including hiring, training and ongoing support for branch associates.

**Unbridled access:** What's ours is yours – every product, resource and tool our full-service, self-clearing NYSE-member firm has to offer. This includes legal and financial reporting; technical assistance; solutions to address high-net-worth client needs; an award-winning, in-house marketing agency to craft custom branding; sophisticated practice management tools; and diversity and inclusion advisor networks.

**Comprehensive care:** From competitive retirement plans to life and health insurance, we have benefits designed to support your family, your professional development and everything in between. We even offer generous employee stock ownership, profit sharing, incentive stock option plans and retention programs after your transition period.

#### OUR MISSION? MEETING YOURS.

In addition to giving you the freedom to draw from our strength and run your business on your terms, Raymond James respects your right to grow. In fact, we've planned for it. Through AdvisorChoice – our flexible, innovative affiliation platform – we offer you several personalized ways to affiliate with our firm. Along with our independent employee business model, you can choose from options including:

- Traditional employee
- Independent contractor
- Independent RIA
- Bank and credit union

So if you ever find yourself wanting another way to do business, you can make the change right here at Raymond James.

#### OUR FIRM'S CORE – THE PRIVATE CLIENT GROUP

An unwavering commitment to sound, disciplined management has helped Raymond James grow into one of the nation's leading financial firms while fostering a celebrated culture where advisors thrive and clients are prioritized. At the core of that commitment, you'll find our Private Client Group – the guiding focus of our firm's support.

To best support our Private Client Group, Raymond James has cultivated a history of strength and stability, delivering over one hundred consecutive quarters of profitability since 1987. We credit much of this performance to our client-first perspective and adherence to our founding values of professional integrity, advisor independence and a conservative, long-term approach to investing.

#### PRIORITIZING YOUR SUCCESS FAR PAST YOUR TRANSITION

We understand the hard work and deliberation that goes into partnering with a new firm, and we're here to make the experience as seamless as possible.

Once you decide to work with Raymond James, our transition team – one of the largest and most experienced in the industry – will help you navigate each step of the process. In addition to holistic onsite support from specialists in registrations, advisory services and beyond, you'll have the expert guidance of a transition consultant and a technology consultant to help you manage each element of your move. But our support doesn't end there. Our dedicated professionals will continue working with you to grow and enhance your practice far past your transition.

To learn more about how Raymond James Advisor Select can help you take control of your business with complete access to ours, call us at 800.248.8863.

# RAYMOND JAMES®

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER  
880 CARILLON PARKWAY // ST. PETERSBURG, FL 33716 // 800.248.8863 // RAYMONDJAMES.COM

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