



December 2022

Texting Policy
From Abuls, Bone & Eller Group of Raymond James

As our lives continue to change and we work to find our new “normal”, we must make sure we continue to conduct business in a matter which is compliant with our industry’s regulations.

Many of you contact your advisor by calling his/her mobile phone. If this is your preferred method of communication, we encourage you to continue calling. However, text messaging for business-related matters to our personal, unmonitored devices is prohibited and we are unable to engage (respond). Raymond James policy is in accordance with governing regulatory requirements, including FINRA and SEC regulations, which require firms to supervise and preserve records of business-related communications, which can only be done if communications are conducted via approved platforms.

If you need to contact us, please call us directly using any of the phone numbers you have or email us. As always, we cannot accept security orders or money movement requests via voice message or email. These types of communication must be verbally confirmed.

Please contact us if you have any questions. Thank you.

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