

LOUISIANA COMPLEX

Baton Rouge | Houma | Lafayette | Mandeville | Monroe | New Orleans | Shreveport



A WORD FROM JUDE HUVAL

As we enter in to the final month of FY2020, we add another terrible tragedy to an endless list as Hurricane Laura devastated our friends in the Lake Charles area and further north, impacting our fellow associates in Shreveport and Monroe. Our thoughts and prayers go out to all of you impacted and wish you all the best for a rapid path back to recovery. On page 4 of this newsletter we've included a link to a website that includes several organizations that are collecting donations for those affected by Hurricane Laura, if you are inclined to give.



In a world filled with so much turmoil and uncertainty I marvel at the performance and the level of professionalism at which you continue to display each and every day. So now, as we prepare for FY2021, we would like to offer our support as each of you put the finishing touches on your strategic planning for your practice.

We will begin with a series of virtual presentations hosted by leaders within our technology, practice management, and operations areas. I will be working closely with our local leadership to ensure that we are focused on topics that are at the forefront of your business plans and helpful in streamlining a service model for our administrative partners as well. Many of you have taken huge strides in implementing a definable, repeatable, and scalable sales process, as proven by all-time high revenue and net new asset growth across our footprint. We are committed to each of you in providing the resources and tools necessary to take your practice to the next level.

We hope you enjoy this newsletter, it's meant to be a place to find helpful resources and good news from around the Complex. If there's anything we can help you with or feedback you'd like to share, please do not hesitate to reach out to me, Jenny, Holly, or Mary Ellison. And, as always, stay safe and thank you for all you do!

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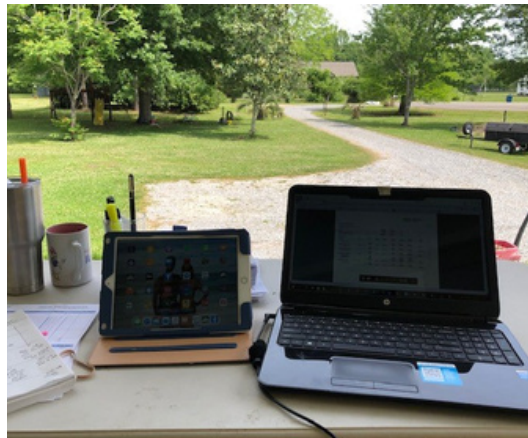
NEED TO KNOW

WORK FROM HOME VIEWS FROM AROUND THE COMPLEX



William Miller

AMP Financial Advisor - Mandeville



Joyce Chustz

Sr. Registered CSA - Baton Rouge



Jason Tiser

Financial Advisor - Monroe



Cyndi Hardy

Registered Client Service
Associate - Lafayette



Ainsley Terrebonne

Senior Registered Client
Service Associate - Mandeville

WELLNESS TIPS

7 EFFECTIVE WAYS TO HELP YOU BETTER MANAGE WORKING FROM HOME

1. STICK TO YOUR ROUTINE

To keep your mind on track while working from home, it's helpful to keep a set schedule. Wake up at your normal time, shower, and get dressed.

2. CREATE A WORKSPACE YOU ENJOY

It's important to set up a work station area. This will help you maintain good posture, avoid distractions, and leave your work behind at the end of the day!

3. STAND UP REGULARLY & MOVE AROUND

Sitting all day isn't healthy... for anyone. Make sure to take breaks and stand up regularly to stretch or move around.

4. GET AT LEAST 30 MINUTES OF FRESH AIR A DAY

Since you're likely spending more times indoors (and at home), open your windows to let in as much daylight and fresh air as possible, and take short walks.

5. STAY CONNECTED WITH YOUR COLLEAGUES

If you work on a team, make sure to check in regularly just like you would in the office.

6. FIGHT THE URGE TO MULTITASK

This may seem like a convenient time to catch up on chores around the house, but it's easier than you'd expect to get distracted. There's nothing wrong with taking a little break, but don't let chores distract you from being productive.

7. PREPARE FOR DISRUPTIONS IF YOU HAVE KIDS

Here are tips from real parents who are mastering the work-from-home challenge; get help, if you can, mix up your hours, explain the situation, and try new activities!

COMPLEX HAPPENINGS



Michael Sotile
(AMP FA - Baton Rouge)
and his wife, Emalee got married
in August!



Jessie Morgan
(CSA - Baton Rouge)
created the ducks above on behalf
of RJ to participate in the Knock
Knock Children's Museum's 3rd
Annual Duck Derby!



Alyssa Vidrine
(CSA - New Orleans)
was featured in the Virtual
Raymond James Associate Art
Show in July with her piece
"Pandemic Portrait"

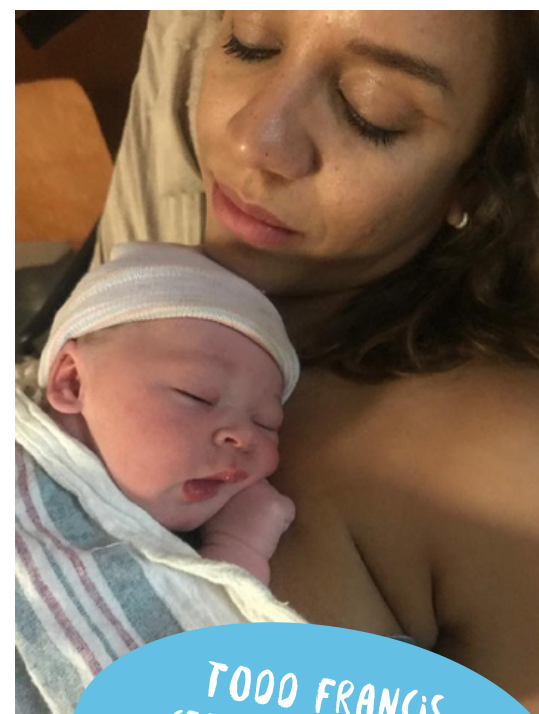
BABIES



SUSAN GAUDIN
(Ops. Manager - Lafayette)
welcomed new grandson,
Olivet James, on June 22



DANA MITCHELL
(CSA - Baton Rouge)
welcomes a new granddaughter,
Allie Marie



TODD FRANCIS
(FA - New Orleans)
welcomes a new grandson,
Olivet

COMPLEX NEWS & HELPFUL LINKS

Click the thumbnail for an updated **RAYMOND JAMES AT A GLANCE** available!



RAYMOND JAMES

Raymond James At A Glance

Raymond James has delivered **129 consecutive quarters of profitability**. We credit much of this performance to the firm's client-first perspective and adherence to its founding core values of **professional integrity, advisor independence, and a conservative, long-term approach to investing**.

BY THE NUMBERS

- ▶ Approximately **8,100** financial advisors
- ▶ Approximately **\$774 billion** in total client assets
- ▶ More than **2X** required total capital ratio
- ▶ **BBB+, stable outlook** credit rating (S&P)

DID YOU KNOW?

Continuing its tradition of giving back, Raymond James and its associates donated **\$42 million** to charitable organizations in 2019, including **\$6.2 million** to the United Way and its partner agencies.

Raymond James was the first in the nation to publish its Client Bill of Rights, setting the standard for the industry.

STRENGTH AND STABILITY

Diluted quarterly earnings per share



A DIVERSIFIED SET OF BUSINESSES*

Total \$7.7 billion

Total net revenue shows fiscal year data ending Sept. 30, 2019



* Charts are intended to show relative contribution of each of the firm's four core business segments. Dollar amounts do not add to total net revenues due to "Other" segment and intersegment eliminations not being depicted. Other includes the firm's private equity activities, as well as certain corporate overhead costs of Raymond James Financial including the interest cost on our public debt.

all client approved!

Click here for the latest RJ articles on

MARKETS & INVESTING

HURRICANE LAURA DONATIONS

Raymond James is not affiliated with any of these organizations

EVERSAFE FRAUD MONITORING

EverSafe is part of Raymond James' Longevity platform. Visit www.eversafe.com to learn more about how the service can help protect clients from financial threats including fraud, identify theft, and persistent scamming!



ADVISOR Q&A

ANDREW HOLMAN BRANCH MANAGER NEW ORLEANS



Starting a new job is never easy but imagine starting that new job at the beginning of a pandemic with most of your branch working from home. **Andrew Holman** is the newest member of the Louisiana Complex serving as our Branch Manager in the New Orleans office.

BACKGROUND AND CAREER PATH

I grew up in Gulf Breeze, Florida (Jenny Bernard and I went to the same high school and college – BUT different years). I moved to New York City in May 2006 after college with my girlfriend. She wanted to get into the hair industry and I wanted to work on Wall Street. Just one issue, we needed jobs! I joined the Equity Finance/Money Management department of AG Edwards in October of 2006 which 6 months later became Wachovia, then Wells Fargo. Fast-forward, after 7.5 wonderful years living in NYC, we decided to move to New Orleans. I joined the Wells Fargo Advisors office in Metairie as the Compliance Officer. In December 2013 I joined Merrill Lynch as the Client Relationship Manager for the Louisiana Market where I spent the last 7 years before joining Raymond James.

CONSIDERING THIS UNIQUE TIME IN THE WORLD, HOW HAS YOUR TIME AT RJ BEEN SO FAR?

It has been outstanding and everyone has been extremely helpful—from locally to the home office. I'm so impressed with our technology capabilities, too! We all want to get back to normal, but right now we just all help each other get through the day by being there for each other.

HOW IS RJ DIFFERENT FROM PAST FIRMS?

Autonomy, entrepreneurial, flexibility, and the culture are a few things that come to mind immediately. People are happy here and LOVE what they do and are proud to work for Raymond James. Everybody operates under the mindset of supporting the financial advisors.

WHAT ARE YOU LOOKING FORWARD TO IN YOUR NEW ROLE?

Becoming part of the RJ family and helping to grow the business and sharing the RJ story.

WHAT DO YOU LIKE TO DO IN YOUR FREE TIME?

Hang out with my wife Jenna and our two French bulldogs: Maybeline and Pearl, sail, fish, and go to Pensacola Beach.



Andrew & his wife, Jenna



Maybeline & Pearl

CONTACT INFO & IMPORTANT DATES

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HOUMA

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Houma, LA 70364
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LAFAYETTE

1220 Camellia Blvd.
Lafayette, LA 70508
337.289.5900

MONROE

1900 N 18th St. STE 700
Monroe, LA 71201
318.327.1120

MANDEVILLE

1540 W Causeway Approach
Mandeville, LA 70471
985.624.1400

NEW ORLEANS

909 Poydras St. STE 1300
New Orleans, LA 70112
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SHREVEPORT

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Shreveport, LA 71101
318.424.2000

SHREVEPORT SOUTH

333 Texas St., Suite 175
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TEXARKANA

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Texarkana, TX 75503
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**HAVE AN IDEA?
WE'RE LISTENING!**

CONTACT US WITH ANY IDEAS FOR CHARITY DRIVES,
FUN EVENTS OR ITEMS FOR THE NEWSLETTER!

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UPCOMING DATES

RJ Women's Symposium (Virtual) - September 16-18

Thanksgiving Day - Thursday, November 26

Christmas Day - Friday, December 25

New Years Day - Friday, January 1

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