

A WORD FROM JUDE HUVAL



Welcome to the first edition of the Southern Louisiana Complex Newsletter! The Southern Louisiana Complex was formed in 2013, shortly after the Morgan Keegan conversion. Since that time, I had a vision for the Complex to provide a high level of service to all of our advisors and support staff through a locally accessible concierge-level team.

My goal is to provide tailored support to everyone, through myself and team, allowing the complex to function cohesively across all branches. Please do not hesitate to reach out to any of us as our primary concern is making sure you have the resources you need to ensure success. We'd like to use this newsletter as means to not only deliver news but to keep everyone in the complex informed and involved. As always, thank you for all you do.

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RAYMOND JAMES cares

For us, giving back is more than the right thing to do.

Since Raymond James was founded in 1962, its leaders, advisors, associates, and clients have dedicated countless hours to their communities. The Southern Louisiana Complex is proud to carry on this tradition in May, proving just how much Raymond James Cares. This year we plan to do even more and we want *you* to be part of it.

If you'd like to participate, please let us know. We're excited to work together to show how much we all care.

Raymond James Cares Volunteer Events:

New Orleans / *Second Harvest Food Bank* / May 16 & May 22

Baton Rouge / *Greater Baton Rouge Food Bank* / May 16

WHAT'S NEW

Meet your

SOUTHERN LOUISIANA COMPLEX SUPPORT TEAM



**JENNY
BERNARD**

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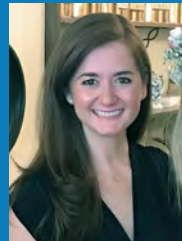
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The **Southern Louisiana Complex Support Team** is here to provide you with accountable, knowledgeable, and dependable support wherever and whenever you need it. Please contact **Jenny, Kristan, Holly, or Mary Ellison** and tell us how we can help you succeed!

Email all of us at: SouthLAComplex@raymondjames.com

MARKET UPDATE & HELPFUL LINKS

CHECK OUT THESE HELPFUL RESOURCES

[Trade Tensions Reach a New Pitch as June Begins](#)

[How to Beat the Market Heat](#)

[Reaching out with Tech -- In Retirement, Too](#)

[What Do Baby Boomers Have to Do with Interest Rates?](#)

"Like most things at Raymond James, our culture of giving back is not a fad or a trend. Giving back is ingrained in everything we do, and has been from the start."

-Paul C. Reilly, Chairman & CEO, Raymond James Financial

COMMUNITY INVOLVEMENT

Our associates are well known for their community involvement. Please get involved in Raymond James Cares month in May and keep us posted on how you're giving back!

NATIONAL MULTIPLE SCLEROSIS SOCIETY'S ON THE MOVE LUNCHEON

"Our friend Laura Bennett was diagnosed with MS in 2016, just after finding out she was pregnant with her second child. My wife, Kellen, and I couldn't begin to imagine how to comfort her while she was dealing with not only an infant and a pregnancy, but also a disorder that will affect her for life.

It is important to us to support her any way we can. Through the MS society, we are making contributions to not only our friend, but to research for a cure.

At the On the Move Luncheon on May 9th, we were lucky enough to join clients, friends and family to support the fight against MS."

-New Orleans Financial Advisor, Justin Ranger

[Website: www.nationalmssociety.org/](http://www.nationalmssociety.org/)



New Orleans associates Abyssa Vidrine and Ilise Greenstein (far left) support Financial Advisor Justin Ranger, surrounded by his sister-in-law Alicia Higginbotham and mother Joanne Ranger on the left and wife Kellen Ranger and mother-in-law Kay Higginbotham on the right.

KREWE DE CAMP

Each May, Mandeville Advisors Stephen Green and Preston Perez help run Krewe de Camp, an overnight summer camp for children with developmental disabilities.

Stephen and Preston have been involved with the non-profit that hosts the camp, Friends Helping Kids, for over 20 years.

[Website: www.friendshelpingkids.org](http://www.friendshelpingkids.org)



CRESCENT CITY CLASSIC

Jenny Bernard is an annual participant in the Crescent City Classic, a 10k that raises millions of dollars each year to benefit local charities. You'll notice Jenny is holding her phone in this photo; as she crossed the finish line she was handling a potential fraud issue for the client of one of our FAs!

[Website: http://www.ccc10k.com](http://www.ccc10k.com)



HOGS FOR THE CAUSE



This spring, multiple advisors participated in and supported a favorite New Orleans event, Hogs for the Cause, which works with hospitals to offer monetary relief to families with children who have brain cancer.

Thanks to Doug Farge, Jude Huval, Justin Ranger, Mike Mann, William Miller, and Kevin Phillips (pictured above, with his son) for supporting this great cause!

[Website: www.hogsforthecause.org](http://www.hogsforthecause.org)

A FEW WORDS with ANDY LOVELL



Alyssa Klein and Andy Lovell

Raymond James recently welcomed Andy Lovell to Raymond James New Orleans. Lovell and Senior Registered Client Services Associate Alyssa Klein, who operate as Lovell Wealth Management, came to Raymond James from Merrill Lynch, where they managed approximately \$177 million in client assets.

Lovell began his 22 year career in finance at J.C. Bradford & Co. in 1996 and continued when the firm was bought by UBS in 2000. In 2007, he continued his career at Merrill Lynch and was recognized by Forbes in 2019 as one of the Best-in-State Wealth Advisors.

"I reached a point where I wanted to be responsible for the structure of my practice," said Lovell of his decision to leave Merrill Lynch and join Raymond James. "The local leadership, support and partnerships to lean on for help remind me of when I started at J.C. Bradford in 1996. Empowerment and independence was consistently provided during the recruitment process and continues to be very evident only one month into my tenure at Raymond James."

Raymond James Chairman Emeritus Tom James visited the New Orleans office earlier this month to speak with advisors. "I wrote Tom James a letter to tell him how much I appreciated the time he took to meet with all of us on his recent visit," said Lovell. "He was full of great information and insight and his explanations of the challenges we have endured as well as the future challenges we have to overcome was very educational. I will cherish that discussion for many years and never forget it. I appreciate how personal a proper leader can be and I am grateful for it."

Please join us in welcoming Andy and Alyssa to the Raymond James team!

We will feature a brief interview with a member of the Southern Louisiana Complex in each issue. Interested? Please let us know!



Raymond James Chairman Emeritus, Tom James, speaking with Chris Montgomery, Lenny Alsfeld, and Meg Kaul

WELCOME TO THE COMPLEX!

Please join us in welcoming our new associates.

Lafayette:

Valerie Molbert, *Operations Specialist*

Mandeville:

Holly Salazar, *Client Service Associate*

Haley Farris, *Advisor Mastery Program*

New Orleans:

Tommy Gamard, *Advisor Mastery Program*

Andy Lovell, *Financial Advisor*

Alyssa Klein, *Senior Registered Client Service Associate*

Kristan Droter, *Senior Operations Specialist*

BIRTHDAYS

MILESTONES

MAY

5/2 Kristan Droter
 5/8 Nathaniel Novak
 5/10 Bill Freiberg
 5/15 Holly Salazar
 5/20 Mary Ellison Sewell
 5/28 Deborah Montalbano

Celebrating 10 years with Raymond James:

5/1 Carol Cavilliere
 5/15 Will Nalty

Celebrating 15 years with Raymond James:

6/15 Chris Crifasi
 6/18 Renee Pastor

Celebrating 20 years with Raymond James:

5/4 Cyndi Hardy

JUNE

6/3 Lenny Alsfeld
 6/5 Cory Lavergne
 6/6 Jessie Morgan
 6/8 Stephen Daste
 6/9 Ladd Sanders
 6/11 Sue Hoppe
 6/12 Gregg Harris
 6/15 Meg Martinez
 6/20 Stephen Miller
 6/22 Sandy Winston
 6/24 Rosa Stelly
 6/26 Bryan Bordelon



Monroe Branch Manager, John Clausen and his wife, Susan, celebrating their son, Alex, at his recent White Coat Ceremony at LSUS



Lafayette associates celebrate Valerie joining the team with a crawfish outing. Raquel Kusy, Laura Aucoin, Valerie Molbert, Cyndi Hardy, Susan Gaudin, Holly Mayatte



Mandeville associates showing their love for their jobs! Deborah Montalbano, Kristin Dantin, Patrice Naquin, Claire Friedrichs and Lois St. Pierre



Raymond James employees enjoying themselves during a crawfish boil at Nola Brewing



IMPORTANT DATES

SOUTHERN LOUISIANA COMPLEX CONTACT INFORMATION

MAY 16 & 22 RAYMOND JAMES CARES EVENTS

MAY 27 MEMORIAL DAY OFFICES CLOSED

JUNE 21 FIRST DAY OF SUMMER

JULY 4 INDEPENDENCE DAY OFFICES CLOSED

JULY 19 & 20 COMPLEX SUPPORT STAFF CONFERENCE

BATON ROUGE (3KL)
445 NORTH BLVD 5TH FLOOR
BATON ROUGE LA 70802
225.344.9020

BATON ROUGE JEFF HWY (3QX)
7350 JEFFERSON HWY STE 490
BATON ROUGE LA 70806
225.407.4640

HOUMA (3NR)
7731 PARK AVE
HOUMA LA 70508
985.580.0157

LAFAYETTE (3LQ)
1220 CAMELLIA BLVD
LAFAYETTE LA 70508
337.289.5900

MONROE (3LO)
1900 N 18TH ST STE 700
MONROE LA 71201
318.327.1120

MANDEVILLE (3LV)
3 SANCTUARY BLVD
MANDEVILLE LA 70470
985.624.4100

MANDEVILLE EAST (3LV01)
4080 LONESOME RD STE A
MANDEVILLE LA 70448
985.231.3440

NEW ORLEANS (3MD)
909 POYDRAS ST STE 1300
NEW ORLEANS LA 70112
504.529.1556

NEW ORLEANS SATELLITE (3RX)
400 POYDRAS ST STE 2430
NEW ORLEANS LA 70130
504.299.2990

SUBMIT YOUR IDEAS

Submit news, tips, events, photos and updates to any member of your Southern Louisiana Complex Support Team:

Jenny Bernard

Kristan Droter

Holly Mayatte

Mary Ellison Sewell

SouthLAComplex@raymondjames.com

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Forbes Best-In-State Wealth Advisors 2019

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