360

WEALTH MANAGEMENT GROUP

OF

RAYMOND JAMES®

& ASSOCIATES, INC.

Member New York Stock Exchange/SIPC

OUR PROCESS

1 ASSESS

Our process begins with a Discovery Meeting. In this session we will get to know you, your finances and your goals – practically and personally.

2 ESTABLISH

With the help of a unique software suite, we take the information gathered in our Discovery Meeting and build a visual map of your financial life that includes your values, goals, relationships, assets, advisors and interests. With this picture in mind, we begin to establish your long-term objectives and determine if we are the right partner to help you achieve them.

3 PLAN

Once we've made the decision to work together, we'll set about formulating a complete financial plan designed to help you make disciplined decisions and achieve what's most important for you and your family. Working in tandem with your other trusted advisors – accountants, attorneys, tax professionals, etc. – we'll build an integrated financial strategy that incorporates every aspect of your finances and your life.

4 SELECT

With a plan in place, we'll start to identify and select the investment vehicles and wealth strategies best suited to your life. Two key principles guide us in these selections: the importance of diversification and the value of remaining invested.

5 BUILD

Building on all of the preceding steps, our process culminates in the implementation of your portfolio and the ongoing monitoring of your progress. And as the markets – and your needs – cycle, our own 360 Wealth Management cycle will begin again to help ensure your continued success.

Our goal is to help you realize yours. To provide wealth management and investment plans that encompass the 360 degrees of your life and give you the freedom to live it.

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