

THE RAYMOND JAMES  
**BY INVITATION ONLY**  
PROGRAM



Every year, Raymond James allows financial advisors to bring a select number of valued clients to visit the firm's international headquarters in St. Petersburg, Florida.

It's an excellent way for current and prospective clients to evaluate the company firsthand, experience the corporate history and culture of Raymond James, and discuss their financial goals directly with their financial advisor and the firm's specialists.

Whether you seek to more effectively manage your assets, protect accumulated wealth or build an ongoing financial legacy, your agenda will be customized and may include:

- A conversation with our asset management specialists or professional portfolio managers
- A discussion of estate planning and charitable giving strategies with representatives of the Financial Planning Department or Raymond James Trust Company
- A meeting with PEARL Services, an exclusive resource for clients with large municipal bond portfolios
- A review of the current offerings within our Alternative Investments Group
- A conversation with Raymond James' chief investment strategist or acclaimed equity research analysts
- A tour of the Tom and Mary James / Raymond James Financial Art Collection, one of the largest privately owned collections in the Southeast with over 1,800 pieces.

Clients who are invited to visit international headquarters will experience in person exactly why their advisor is proud to be affiliated with a firm like Raymond James.

**RAYMOND JAMES®**