


*The
Charitable
Partners
Program*

RAYMOND JAMES[®]
You first.

“In helping others, we shall help ourselves, for whatever good we give out completes the circle and comes back to us.”

~FLORA EDWARDS~



*Committed to you and
your community*

*B*orn of a desire to help strengthen our local communities throughout the nation, Raymond James offers an inspirational program that provides charitably conscious investors a way to meet their future investment needs while contributing to the growth and well-being of a charitable or nonprofit organization. *The Charitable Partners Program* was created in response to the overwhelming need for ongoing financial support that charitable and nonprofit organizations so desperately require. Raymond James determined that the best way to help our communities at large is to provide an “avenue with purpose” for investors whose goal it is to support their philanthropic cause of choice through their investment firm with no added cost to them. The mission of *The Charitable Partners Program* is to assist a diverse group of charitable and nonprofit organizations in raising the funds necessary to support the ongoing direction and administration of their worthy causes. What an easy way to make such a big difference.





Raymond James Who we are ...

Founded in 1962, Raymond James has been helping investors achieve their financial goals and dreams by providing superior financial products and services while maintaining a lifelong commitment to excellence and integrity. Our financial advisors offer the finest in individual client service, premier investment choices and a wide array of financial planning strategies, all supported by the resources at our international headquarters in St. Petersburg, Florida. Throughout the investment planning process, our financial advisors consult with their clients on a customized, individual basis. From carefully evaluating their financial objectives, to implementing strategies and monitoring investment performance, they are committed to their clients' financial futures. Our financial advisors have the liberty to recommend the investment tools and choices that best help achieve the client's financial goals.

Not only does Raymond James provide traditional, commission-based investment alternatives, we also provide a wealth of fee-based products and services with the

purpose of fulfilling all financial needs. Throughout the years, we have devoted considerable time and effort in the development of our fee-based business. With a variety of fee-based programs available, we can easily help meet our clients' comprehensive asset management needs. Whether the client chooses to manage his or her own assets, allow the financial advisor to maintain control, or use a professional third party money manager, Raymond James can provide these resources. Our experience and expertise in the financial services industry also include banking and trust services, estate planning, insurance, annuities, cash management and exceptional research. Our winning combination of national strength and local personalized investment guidance helps our clients' achieve secure financial futures. *The Charitable Partners Program* was developed with a simple concept in mind, the desire to instill community awareness through a sound investment philosophy.





An innovative birth

The Charitable Partners Program was initially developed as a result of a family tragedy that fueled the desire of an individual to make a difference in his community. Because of the overwhelming support this individual received from his friends and the community as a whole, he was determined to find a way to give something back as a tribute to the hardships he and his family had to overcome. As a charitably conscious firm, Raymond James decided to aid in the development of this program by providing financial support to help ensure its success. In time, our “seed” began to grow. After embracing the concept as one that we could evolve and distribute to others who possess the same commitment to their community, *The Charitable Partners Program* has blossomed into the program we offer today.

An avenue with purpose

The Charitable Partners Program was developed to provide an *effortless* way for any investor to make a difference in his or her community with no additional costs. To take part in our program, all we need is you. Designed for the charitably conscious investor, *The Charitable Partners Program* operates in a very simple way. Our financial

advisors develop a relationship with one or a variety of nonprofit organizations in their community. When an investor has assets managed by Raymond James, the financial advisor donates a portion of his or her net management fees and/or commissions earned to the charitable organization selected by the investor. The investor has the option of choosing one of the charitable organizations that the financial advisor already has a relationship with, or one of their own. A benefit to the client is that there is no added cost or effort for those who take part in this program.



While the investor retains full custody of his or her assets, the donation comes directly from the financial advisor. There is also no added cost to the charitable organization that takes part in *The Charitable Partners Program*. The donations are made on a quarterly basis either in the name of the investor, or anonymously. The financial advisor thus establishes an ongoing revenue stream for the charity while providing professional financial services for the client. The charity can count on continuing





donations from the investor to support its cause with no added effort as well. *The Charitable Partners Program* is available to all qualified charities and nonprofit organizations. Raymond James provides the corporate endorsement of our charitably conscious financial advisors as well as all back office support and services. There is no easier way to contribute to the growth of your community.

Invest In Your Community

*A*t Raymond James, we understand your heartfelt desire to contribute to the well-being of your community. Without the support of community-conscious individuals, the charitable and nonprofit organizations that provide our communities the means to grow would surely cease to exist. *The Charitable Partners Program* provides a way for investors to help charities and nonprofit organizations receive the ongoing support they need to continue their cause. What better way for investors to give something back to their communities while building wealth and creating a secure financial future through a local Raymond James branch. Our conservative philosophy and selection of superior financial alternatives have helped us make a difference in the lives of generations of investors throughout the United States. Let us help you make a difference in your community by supporting a worthy cause. For more information, please call today.



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