

# Charitable Partners Program

## Committed To You and Your Community!

Born of a desire to help strengthen our local communities throughout the nation, Raymond James Financial, Inc. 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 non-profit organization. The Charitable Partners Program was created in response to the overwhelming need for ongoing financial support that charitable and non-profit 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 non-profit 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.



## 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 investment firm, Raymond James decided to aid in the promotion of this program by providing the necessary financial support essential to 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 as a non-traditional means to provide an effortless way for any investor to "make a difference" in their community with no added cost to them or their cause of choice. 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 advisor develops a relationship with one or a variety of non-profit organizations in their community. When an investor has their assets managed by Raymond James, the financial advisor automatically donates a portion of their net management fee and/or commission generated by the account to the clients cause of choice. The investor has the option of choosing one of the charitable organizations that their 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 their 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 their cause with no added effort as well. The Charitable Partners Program is available to all charities and non-profit 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**

At 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 non-profit organizations that provide our communities the means to grow would surely cease to exist. The Charitable Partners Program provides a way for investors to make certain that their charities and non-profit organizations receive the ongoing support they need to continue their cause. What better way to "give something back" to your community than building wealth and creating a secure financial future through your local branch of Raymond James. Our conservative philosophy and selection of superior financial products 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 the lives of those less fortunate by supporting a worthy cause.