



## **IMPORTANT FINANCIAL RECORDS**

Consolidate and streamline pertinent information to help heirs move forward

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**RAYMOND JAMES**

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## POWERFUL PLANNING

Planning early and well can shape not only your financial plan, but your life plan. We believe in the power of sophisticated planning, and in getting – and remaining – organized to ensure your estate wishes are carried out.

This financial records organizer enables you to track your important documents and the professionals who are most knowledgeable about each. Your professional advisors likely maintain similar information for you, but this organizer serves as backup, if and when you need it. Take some time each year to update this information, especially following a major life event, and be sure to keep this document in a protected place.

As you complete the sections within, speak with your advisor and other planning professionals about any concerns or questions that arise. Comprehensive estate planning is an intricate and constantly evolving process – one you can work through and tailor to your needs with the help of the knowledgeable professionals in your life.

This record is for organizational purposes only. No disclosure of actual financial position is made herein. The law of this state is controlling with respect to many aspects of wills, marriage, divorce, care/custody of minor children and estate taxation.

**Take some time each year  
to update this information,  
especially following a major life event**

The financial affairs record of \_\_\_\_\_

Completed by \_\_\_\_\_

State of legal residence \_\_\_\_\_

As of date \_\_\_\_\_

**MY PROFESSIONAL TEAM**

Financial Advisor \_\_\_\_\_

Attorney(s) \_\_\_\_\_

Accountant(s) \_\_\_\_\_

Insurance Broker(s) \_\_\_\_\_

**LAST WILL AND TESTAMENT, RELATED CODICILS**

Drafting a will and recording its pertinent information here will help ensure your estate is distributed according to your wishes when the time comes. Without a will, your heirs will inherit according to current law, and the court will appoint administrators and guardians as necessary – potentially adding time and costs to the process.

**If you don't have a will,**  
a specialized attorney  
can offer specific advice  
regarding your situation

I have a current will:  Yes  No      Date executed: \_\_\_\_\_ (mm/dd/yyyy)

My original will can be found at \_\_\_\_\_

My will names the following:

Guardians of my children \_\_\_\_\_

Personal representatives \_\_\_\_\_

Trustees \_\_\_\_\_

The attorney who drafted my will is:

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

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## TRUST AGREEMENTS

A trust provides for the care of your dependents when you no longer can. Ask your financial advisor if this planning vehicle is right for your family, particularly if you have complicated family relationships, blended families, special needs situations or educational and philanthropic goals. If deemed appropriate, there are several trust options available to meet your needs.

To learn more about the ins and outs of trusts, visit [raymondjames.com/trust](https://www.raymondjames.com/trust)

I have an existing trust:  Yes  No      Date executed: \_\_\_\_\_ (mm/dd/yyyy)

The trust agreement can be found at \_\_\_\_\_

The trust benefits \_\_\_\_\_

The trustees are \_\_\_\_\_

Successor trustees \_\_\_\_\_

I am a beneficiary of a trust established by \_\_\_\_\_

The papers can be found at \_\_\_\_\_

Upon my death, my heirs will benefit from trust funds established by \_\_\_\_\_

The papers can be found at \_\_\_\_\_

### Major life events

trigger beneficiary designation updates.

These events can include:

- ▶ Change in marital or health status
- ▶ Death or incapacity of spouse or a child
- ▶ Impending sale of family business
- ▶ Significant change in net worth
- ▶ Birth of children/grandchildren
- ▶ Nearing retirement
- ▶ Change in tax laws

**INSURANCE POLICIES**

My general insurance broker is:

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

**LIFE INSURANCE**

Life insurance can provide an immediate source of cash for your family during an inherently difficult time. It's a good idea to preserve policies and premium receipts in a safe place. Copies of the policy numbers, issuing companies, beneficiaries, etc., should be given to your executor and placed in your safe deposit box.

**Life insurance can provide**  
an immediate source of  
cash for your family during  
an inherently difficult time

Location of policies \_\_\_\_\_

The itemized list or audit can be found at \_\_\_\_\_

**POLICIES OWNED BY ME**

Policy number \_\_\_\_\_

Insured person \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Addresses of beneficiaries \_\_\_\_\_

Loans against the policy \_\_\_\_\_

**POLICIES OWNED BY OTHERS ON MY LIFE**

Policy number \_\_\_\_\_

Insured person \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Addresses of beneficiaries \_\_\_\_\_

Loans against the policy \_\_\_\_\_

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Some or all of my life insurance policies contain extra disability benefits:

- Accidental death       Health/medical       Medicare supplement       Long-term care

The following papers are filed with the policies:

- Premium receipts       Dividend statements       Settlement agreements       Assignments

#### DISABILITY

Let your family know where these policies are located so they can make immediate claims if necessary.

Contact information of agent is:

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

In addition to employer-provided benefits, I carry:

- Accidental death       Disability       Health/medical       Hospitalization  
 Long-term care       Medicare supplement       Sickness       Other insurance

The itemized list can be found at \_\_\_\_\_

\_\_\_\_\_

The policies can be found at \_\_\_\_\_

\_\_\_\_\_

#### PERSONAL LIABILITY/UMBRELLA INSURANCE

The paperwork for my personal liability/umbrella insurance can be found at \_\_\_\_\_

\_\_\_\_\_

#### HEALTH INSURANCE

My health insurance paperwork can be found at \_\_\_\_\_

\_\_\_\_\_

#### ANNUITIES

I own annuity contracts:  Yes  No

The contracts can be found at \_\_\_\_\_

\_\_\_\_\_

The itemized list can be found at \_\_\_\_\_

\_\_\_\_\_

**MEDICAL RECORDS**

It's important for your medical information to be accessible to those who will assist you if a medical issue should arise.

**A living will is also often called** an advance healthcare directive, advance directive, medical directive or advance decision

**LIVING WILLS**

Provide your attorney and doctor(s) with original copies of these documents.

I have a current living will:  Yes  No      Date executed: \_\_\_\_\_ (mm/dd/yyyy)

My living will can be found at \_\_\_\_\_

Contact information of attorney who drafted my living will is:

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

**DURABLE POWER OF ATTORNEY/HEALTHCARE SURROGATE OR PROXY**

The paperwork for my healthcare surrogate or proxy can be found at \_\_\_\_\_

**PHYSICIAN ORDERS FOR LIFE-SUSTAINING TREATMENT (POLST)**

My POLST paperwork can be found at \_\_\_\_\_

**DO NOT RESUSCITATE (DNR) AND DO NOT INTUBATE (DNI) ORDERS**

My DNR paperwork can be found at \_\_\_\_\_

My DNI paperwork can be found at \_\_\_\_\_

**HIPAA FORM**

My HIPAA form is located at \_\_\_\_\_

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**MONETARY ACCOUNTS**

Thousands of bank accounts go unclaimed each year because account holders failed to share the information with their families. Ensure yours isn't among them.

**In 2015, only \$3.24 billion of \$7.76 billion in unclaimed assets were reclaimed by the rightful owner**

Source: naupa, unclaimed.org

**TYPE OF ACCOUNT**

**Checking** – Approximate value \_\_\_\_\_

Location \_\_\_\_\_

Owner(s) \_\_\_\_\_

**Certificates of deposit** – Approximate value \_\_\_\_\_

Location \_\_\_\_\_

Owner(s) \_\_\_\_\_

**Savings** – Approximate value \_\_\_\_\_

Location \_\_\_\_\_

Owner(s) \_\_\_\_\_

**Money market** – Approximate value \_\_\_\_\_

Location \_\_\_\_\_

Owner(s) \_\_\_\_\_

**Other** \_\_\_\_\_

The location of checkbooks/bankbooks is \_\_\_\_\_

The following can sign checks on my behalf:

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

**DEBT**

Exclusive of secured loans, such as mortgages, I owe money to \_\_\_\_\_

The loan agreements and other documentation can be found at \_\_\_\_\_

The following owe me money \_\_\_\_\_

The loan agreements and other documentation can be found at \_\_\_\_\_



**SECURITIES**

Valuable rights may be lost if the owners of stocks and bonds can't be located. Records of purchase, along with other documents, are also needed for tax purposes.

**Records of security purchases,**  
along with other documents,  
are needed for tax purposes

Contact information of my financial advisor is:

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

**SECURITIES OWNED**

**Brokerage**

Location \_\_\_\_\_

Owners \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Obtained by:  Purchase  Gift  Inheritance  Other

**Brokerage**

Location \_\_\_\_\_

Owners \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Obtained by:  Purchase  Gift  Inheritance  Other

**Brokerage**

Location \_\_\_\_\_

Owners \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Obtained by:  Purchase  Gift  Inheritance  Other

**Stock certificates held by individual**

Location \_\_\_\_\_

Owners \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Obtained by:  Purchase  Gift  Inheritance  Other

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**Stock options**

Location \_\_\_\_\_

Owners \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Obtained by:  Purchase  Gift  Inheritance  Other

**Bonds held by individual**

Location \_\_\_\_\_

Owners \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Obtained by:  Purchase  Gift  Inheritance  Other

**U.S. savings bonds**

Location \_\_\_\_\_

Owners \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Obtained by:  Purchase  Gift  Inheritance  Other

Records of buys and sells can be found at \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

A list of my bonds and their serial numbers can be found at \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Some or all securities are pledged for loans  Yes  No

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

They are with \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**PROFESSIONAL BENEFITS**

Information about the benefits supplied to you by your employer can help your family take quick action, if necessary.

It's essential to keep access to your personal financial records in a **centralized and secure location**

I am currently employed:  Yes  No

Contact information of my most recent employer is:

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

Dates of employment \_\_\_\_\_

I participated in the following employer-sponsored benefit plans \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_

I own a business:  Yes  No

Name and address of my business is:

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

Contact information for my successor is:

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

My business succession plan can be found at \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_

My business buy-sell agreements can be found at \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_

My business valuation documents can be found at \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_

Key insurance policies covering the business \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_

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**BUSINESS ACCOUNTS**

**TYPE OF ACCOUNT**

**Checking** – Approximate value \_\_\_\_\_

Location \_\_\_\_\_

Owner(s) \_\_\_\_\_

**Certificates of deposit** – Approximate value \_\_\_\_\_

Location \_\_\_\_\_

Owner(s) \_\_\_\_\_

**Savings** – Approximate value \_\_\_\_\_

Location \_\_\_\_\_

Owner(s) \_\_\_\_\_

**Money market** – Approximate value \_\_\_\_\_

Location \_\_\_\_\_

Owner(s) \_\_\_\_\_

**Loans** – Approximate value \_\_\_\_\_

Location \_\_\_\_\_

Owner(s) \_\_\_\_\_

**Other** \_\_\_\_\_

The location of checkbooks/bankbooks is \_\_\_\_\_

The following can sign checks on my behalf:

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

**RETIREMENT PLANS**

Those important to you should know where to find information about your personal retirement plans, employee pension or profit-sharing plans and annuities, if necessary.

Those important to you should know where to find information about **your personal retirement plans**

My retirement plans include:

**TYPE OF ACCOUNT**

**401(k)s**

Location \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Approximate value \_\_\_\_\_

**403(b)**

Location \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Approximate value \_\_\_\_\_

**Annuities**

Location \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Approximate value \_\_\_\_\_

**Deferred compensation**

Location \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Approximate value \_\_\_\_\_

**Keoghs**

Location \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Approximate value \_\_\_\_\_

**Pensions**

Location \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Approximate value \_\_\_\_\_

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**Profit-sharing**

Location \_\_\_\_\_

\_\_\_\_\_

Beneficiaries \_\_\_\_\_

\_\_\_\_\_

Approximate value \_\_\_\_\_

**This document, when kept safe and regularly updated,** provides your loved ones with a roadmap to follow when you're no longer there to guide them

**Roth IRAs**

Location \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Approximate value \_\_\_\_\_

**Traditional IRAs**

Location \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Approximate value \_\_\_\_\_

**SOCIAL SECURITY**

I'm covered by Social Security:  Yes  No

My Social Security card can be found at \_\_\_\_\_

\_\_\_\_\_

My Social Security earnings records can be found at \_\_\_\_\_

\_\_\_\_\_

I'm eligible for survivors benefits:  Yes  No

Monthly benefit or projected monthly benefit at full retirement age \_\_\_\_\_

\_\_\_\_\_

**TAX RETURNS**

Copies of tax returns are often required to prepare returns for estate settlement.

Contact information for my accountant is:

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

\_\_\_\_\_

My tax returns can be found at \_\_\_\_\_

Supporting documentation is attached to the returns:  Yes  No

My withholding tax forms and receipts received from my employer can be found at \_\_\_\_\_

**PERSONAL PAPERS**

This information is crucial for insurance purposes, Social Security, pensions and other circumstances that require legal proof of age, relationship or place of birth.

**BIRTH CERTIFICATES**

I have a birth certificate:  Yes  No

My birth certificate can be found at \_\_\_\_\_

I was born in \_\_\_\_\_

Date \_\_\_\_\_

**Naturalization/citizenship papers**

I was born outside the United States:  Yes  No

My citizenship or naturalization papers can be found at \_\_\_\_\_

**OFFICIAL RECORDS**

**MARRIAGE CERTIFICATE**

Parties involved \_\_\_\_\_

Date \_\_\_\_\_ State of jurisdiction \_\_\_\_\_

Location of documents \_\_\_\_\_

**PRENUPTIAL AGREEMENT**

Parties involved \_\_\_\_\_

Date \_\_\_\_\_ State of jurisdiction \_\_\_\_\_

Location of documents \_\_\_\_\_

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**DIVORCE OR SEPARATION PAPERS**

Parties involved \_\_\_\_\_

Date \_\_\_\_\_ State of jurisdiction \_\_\_\_\_

Location of documents \_\_\_\_\_

**CUSTODY AGREEMENTS**

Parties involved \_\_\_\_\_

Date \_\_\_\_\_ State of jurisdiction \_\_\_\_\_

Location of documents \_\_\_\_\_

**MILITARY RECORDS**

Parties involved \_\_\_\_\_

Date \_\_\_\_\_ State of jurisdiction \_\_\_\_\_

Location of documents \_\_\_\_\_

**PASSPORTS/VISAS**

Parties involved \_\_\_\_\_

Date \_\_\_\_\_ State of jurisdiction \_\_\_\_\_

Location of documents \_\_\_\_\_

**RESIDENCES**

Records are useful if a property you own is to be sold, mortgaged or leased. They also help facilitate inheritance of the property and assist with tax-return preparation.

**Owning multiple properties makes planning more complex** and accurate recordkeeping even more imperative

Address of my primary residence is:

\_\_\_\_\_  
\_\_\_\_\_

I own this property:  Yes  No

Property owners' names \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_



**KEY DOCUMENTS**

It's important to keep information about your property in an accessible, yet secure, place.

**Building costs**

Location \_\_\_\_\_

**Closing statement**

Location \_\_\_\_\_

**Home deed**

Location \_\_\_\_\_

**Leases**

Location \_\_\_\_\_

**Mortgage documents**

Location \_\_\_\_\_

**Mortgage insurance**

Location \_\_\_\_\_

**Surveys**

Location \_\_\_\_\_

**Tax receipts**

Location \_\_\_\_\_

**Title abstract**

Location \_\_\_\_\_

**Title insurance**

Location \_\_\_\_\_

My mortgage is held by:

Bank name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_

If property is leased, the name, address and contact information for my landlord is:

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

I own additional property:  Yes  No

Address \_\_\_\_\_

\_\_\_\_\_

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## TANGIBLE PROPERTY

A list of my household inventory and photographs can be found at

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Tangible property includes**  
everything from household  
items to your best china

A list of my jewelry, paintings, silver, china and other valuables can be found at

\_\_\_\_\_  
\_\_\_\_\_

The items are insured:  Yes  No

Contact information for my insurance company is:

Name \_\_\_\_\_

Policy number \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

## INCOME-PRODUCING PROPERTIES

Residential or commercial properties:

Property address \_\_\_\_\_

Ownership percentage \_\_\_\_\_

Titling \_\_\_\_\_

Property address \_\_\_\_\_

Ownership percentage \_\_\_\_\_

Titling \_\_\_\_\_

Property address \_\_\_\_\_

Ownership percentage \_\_\_\_\_

Titling \_\_\_\_\_

Closely held business ventures:

Name \_\_\_\_\_

Property address \_\_\_\_\_

Active/passive \_\_\_\_\_ Ownership percentage \_\_\_\_\_

Titling \_\_\_\_\_

CARS, BOATS AND OTHER VEHICLES

**Vehicle** \_\_\_\_\_

Location of title \_\_\_\_\_

Covered by insurance?  Yes  No

Location of policy \_\_\_\_\_

Insurance company \_\_\_\_\_

Insurance policy number \_\_\_\_\_

**Vehicle** \_\_\_\_\_

Location of title \_\_\_\_\_

Covered by insurance?  Yes  No

Location of policy \_\_\_\_\_

Insurance company \_\_\_\_\_

Insurance policy number \_\_\_\_\_

**Vehicle** \_\_\_\_\_

Location of title \_\_\_\_\_

Covered by insurance?  Yes  No

Location of policy \_\_\_\_\_

Insurance company \_\_\_\_\_

Insurance policy number \_\_\_\_\_

**Vehicle** \_\_\_\_\_

Location of title \_\_\_\_\_

Covered by insurance?  Yes  No

Location of policy \_\_\_\_\_

Insurance company \_\_\_\_\_

Insurance policy number \_\_\_\_\_

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**SAFE DEPOSIT BOX**

I have a safe deposit box:  Yes  No

It can be found at \_\_\_\_\_

The following people have access:

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

**FINAL ARRANGEMENTS**

This information ensures your trusted heirs will be able to carry out your wishes in the way you intended.

**LETTERS OF INSTRUCTION**

Location \_\_\_\_\_

**ETHICAL WILL**

Location \_\_\_\_\_

**ORGAN OR BODY DONOR CERTIFICATION**

Location \_\_\_\_\_

**FUNERAL INSTRUCTIONS**

Location \_\_\_\_\_

**BURIAL INSTRUCTIONS**

Location \_\_\_\_\_

**DEED FOR CEMETERY PLOT/MAUSOLEUM/COLUMBARIUM**

Location \_\_\_\_\_

**PREPLANNED FUNERAL ARRANGEMENTS**

Location \_\_\_\_\_

**DEATH CERTIFICATES OF FAMILY MEMBERS**

Location \_\_\_\_\_

NOTIFICATION INFORMATION

List of people and organizations to notify can be located at \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

ELECTRONIC PROPERTY

Important information is often stored exclusively online. Providing your user IDs and passwords for pertinent websites enables your trusted heirs to readily access your various online accounts, if necessary.

The list of my critical user IDs and passwords can be found at

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Provide login information** for more than just your financial accounts. Your survivors will also need to access your social networking sites, among others.

OTHER

The sections presented in this organizer are general in nature. Your situation may differ, so be sure to include other important information – such as notes about endowments and philanthropic pledges – in this section. Remember that your loved ones may use this as a guide when you’re no longer able to be there, so be sure to include all relevant information.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
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Your loved ones may use this as a guide when you're no longer able to be there, so be sure to **include all relevant information**

### Preparing for the future

To craft a truly comprehensive estate plan, it's essential to keep access to your personal financial records in a centralized and secure location. This document, when kept safe and regularly updated, provides your loved ones with a roadmap to follow when you're no longer there to guide them. By sharing this information, you help to ensure the legacy you've worked so hard to achieve can be maintained by those you care most about. Coordinate with your financial advisor and other planning professionals to fill in any gaps and to address questions that may have been raised during this process. Then, let your loved ones know how they can access this crucial information when the time comes.

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**LIFE WELL PLANNED.**

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**RAYMOND JAMES®**

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