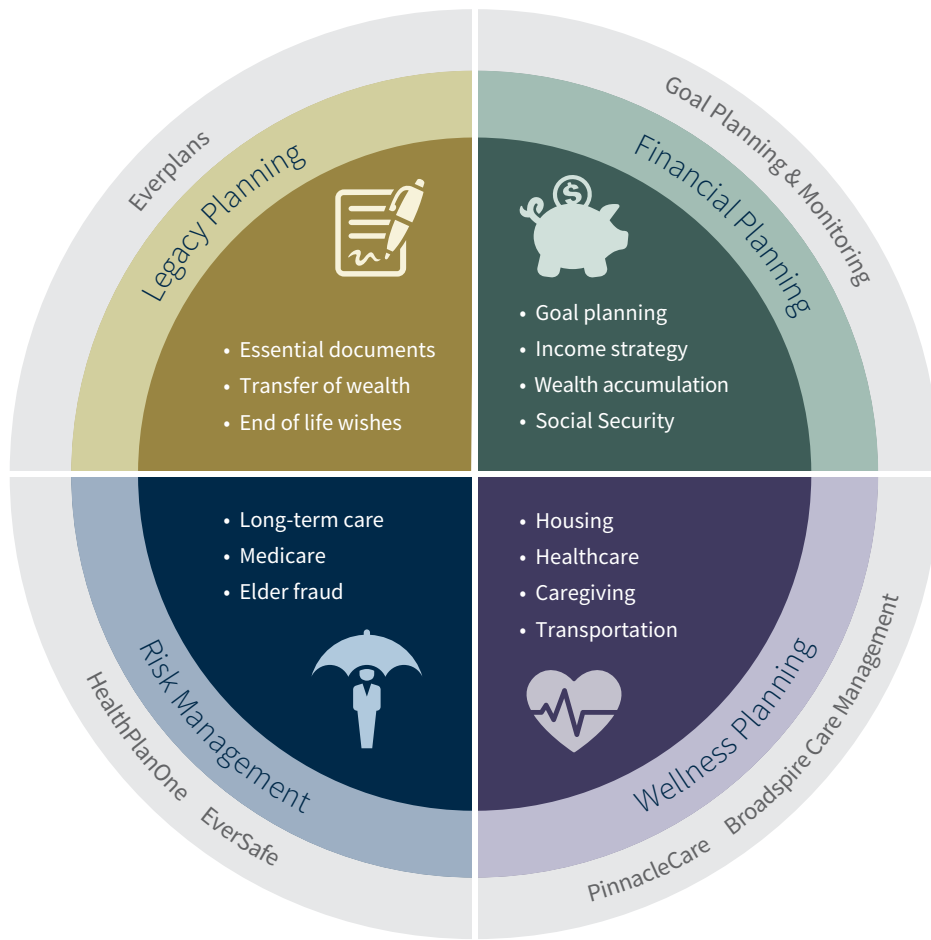


Resources for a long and lively retirement

There's a lot to consider about how you will live in your retirement years – from choosing the right Medicare plan, to the possibility of a healthcare episode, to finding a ride to the grocery store. Raymond James has collaborated with the below services to help navigate this phase of life.



FINANCIAL PLANNING

GOAL PLANNING & MONITORING

This sophisticated software program shows your full financial picture. It takes into account your specific goals, investment strategy, risk tolerance, spending and saving rates – and tells you the probability of achieving your goals*.

WELLNESS PLANNING

PINNACLECARE

A concierge health service, PinnacleCare helps you manage a healthcare episode. PinnacleCare maintains relationships with top-ranked medical centers across the country and works with you to find the best treatment, schedule appointments, coordinate seeking a second opinion – even help ensure an accurate diagnosis.

BROADSPIRE CARE MANAGEMENT

Broadspire helps you plan for one of the largest financial factors in retirement: housing and healthcare. Broadspire will assess, recommend and facilitate strategies for staying in your home as you age and other care needs associated with aging, from minor home modifications to finding the best memory care facility.

RISK MANAGEMENT

EVERSAFE

EverSafe seeks to protect you from financial fraud by using a proprietary algorithm to monitor your accounts for unusual activity. Alerts are sent to you and those designated as trusted contacts.

HEALTHPLANONE

HealthPlanOne helps you navigate the complexities of Medicare by comparing options and finding the most cost-effective plan for you, while assuring appropriate coverage for your preferred providers, doctors and medications.

LEGACY PLANNING

EVERPLANS

Everplans enables you to organize important information – from a will to a favorite family recipe – and end-of-life wishes, which can be shared with trusted family and friends. Everplans guides you through the step-by-step process, helping ensure your family has a full understanding of your life and wishes.

RAYMOND JAMES IS HERE FOR YOU
AS YOU PLAN FOR AND LIVE THROUGH RETIREMENT.

RAYMOND JAMES®

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*IMPORTANT: The projections or other information generated by Goal Planning & Monitoring regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results and are not guarantees of future results. Results may vary with each use and over time. Asset allocation does not guarantee a profit nor protect against loss.

Investment products are: not deposits, not FDIC/NCUA insured, not insured by any government agency, not bank guaranteed, subject to risk and may lose value.

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