



TRANSITION SUPPORT THAT STAYS WITH YOU

A streamlined commitment-to-start-date process and ongoing
post-transition assistance from Raymond James

RAYMOND JAMES

“When I visited Raymond James for the first time, I immediately had a sense that this place was different. It was client-oriented, people-oriented. It just felt like a place that I needed to be.”

– Mabry “Trip” Phillips, CPFA®, RICP, AIF® // Financial Advisor
Registered Principal // 401(k) Retirement Plan Consultant

Making the move to Raymond James means support at every stage of transition – from preparing your practice to setting up your office to transferring client accounts – and beyond.

NO. 1 – HOME OFFICE VISIT

With this behind-the-scenes look, you’ll explore our platform, meet our leaders and have your questions answered directly by relevant business unit professionals on a tour designed singularly for you and your practice.

NO. 2 – PREPARATION

Once you’ve made your decision, we’ll get right to work, mapping out a plan for every step and coordinating the team that will support you throughout:

Meet your transition team > Participate in training and education > Create a marketing plan > Build your technology infrastructure

NO. 3 – TARGET DATE

This is the day your new partnership with Raymond James becomes official. Your licenses are transferred, your technology goes live and you can begin sending approved communications to clients with support from the transitions team.

NO. 4 – IMPLEMENTATION

Now your dedicated support team, combined with vast resources available on-call, focuses on bringing your clients over smoothly, providing tech training and education, and untangling any snags along the way:

Communicate the change > Bring clients on board > Manage transfer process and supporting account features > Continue education > Collaborate with your support team

NO. 5 – GRADUATION

With your clients onboard, the liveliest part of your transition is over, but we’re still with you to make sure you are equipped to harness the power of the Raymond James platform and the support of our home office team.

1

Home office visit

2

Preparation

3

Target date

4

Implementation

5

Graduation

Your move could start today.

Making a decision this big – for the benefit of your clients, your practice and you – is no small thing. Our transition process ensures you’ll have a ready partner by your side all the way through your transition and into your thriving practice.

Visit advisorchoicecontact.com to get in touch with a consultant and learn more.

RAYMOND JAMES®

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