COLLABORATING WITH RAYMOND JAMES TRUST, N.A.

An attorney's guide to the personalized service and support we offer you and your clients.

RAYMOND JAMES *Trust*

Get to know a firm as dedicated to the client's best interests as you are.

As a part of your client's professional team, Raymond James Trust is here to provide a degree of administrative expertise and experience, state-of-the-art accounting systems, investment customization, and an exceptional standard of service you won't find just anywhere. And we do it all backed by the strength and resources of one of the country's largest independent financial planning and wealth management firms.

RAYMOND JAMES TRUST, N.A.

Founded in **1992**	*Over* **$8 billion** *in total assets under administration*

RAYMOND JAMES TRUST

Established in 1992, Raymond James Trust, N.A., is a wholly owned subsidiary of Raymond James Financial, Inc. (NYSE-RJF). Today, the company administers more than $8 billion in trust assets among all 50 states.

Our professional staff is comprised of attorneys and trust professionals with extensive experience in administering and operating a wide variety of trusts – everything from grantor trusts to special needs trusts. Under our federal charter, Raymond James Trust may act as trustee, custodian, agent or personal representative/executor.

RAYMOND JAMES

Raymond James Trust is backed by the financial strength and stability of our parent company, Raymond James. Founded in 1962, Raymond James is one of the largest financial services firms in the United States, serving both institutional and retail clients around the globe.

Raymond James has over 8,000 financial advisors who manage client accounts valued at $1.02 trillion. With 133 consecutive quarters of profitability*, our success is based on the firm's unwavering commitment to its founding core values: we put clients first, we act with integrity, we think long term and we value independence.

RAYMOND JAMES

Founded in **1962**	**$1.02** *trillion in total client assets*

*As of March 31, 2021

Past performance is not indicative of future results. The information provided is for informational purposes only and is not a solicitation to buy or sell Raymond James Financial stock.

WE PUT CLIENTS FIRST | WE ACT WITH INTEGRITY | WE VALUE INDEPENDENCE | WE THINK LONG TERM

Raymond James was founded on these core values – values that still guide us today.

WHAT SETS RAYMOND JAMES TRUST APART?

1. We are not bank owned.
Historically, traditional bank trust departments have had a narrower, more proprietary view of investing trust assets. Being owned by a financial services firm has enabled us to design a framework that provides not only excellent personal service, but an investment architecture in which portfolios can be tailored to help meet the needs of an individual trust and its beneficiaries.

2. We created an innovative trust services framework.
We've developed an internal structure and implemented systems that offer timely and accurate accounting, a team of trust administrators with strong academic and professional credentials, and a demonstrated commitment to the highest standards of client service.

3. We offer an open investment platform.
Our customized investing approach makes a full array of investment choices and instruments available for use in our trust portfolios. We don't offer a "one size fits all" solution, but rather an individually tailored investment policy designed to help meet personal needs both now and in the future.

4. We hold ourselves to the highest standards of client service.
Each member of our team is committed to and passionate about protecting the legacies of our clients. And that dedication is complemented – and deepened – by the service-centered culture that Raymond James was founded on, and on which it continues to thrive.

5. Our team of professionals is exceptionally knowledgeable and experienced.

We've assembled a team of experienced, caring professionals who, unlike other providers of trust services, deal exclusively with trust issues and have no sales responsibility. We offer a comprehensive range of services – including acting as trustee, agent or custodian for individual trusts, charitable trusts, life insurance trusts, special needs trusts, other specialty trusts and beneficiary IRAs.

HOW WE WORK WITH YOU

Our team is here to support both you and your client throughout the drafting process.

If Raymond James Trust is named as initial trustee …
You will work closely with one of our knowledgeable trust consultants, and our team will carefully review your drafted trust document and the most recent statement of assets to determine the next steps required for our potential acceptance as trustee or co-trustee.

If Raymond James Trust is being named as successor trustee …

Our official name: Raymond James Trust, N.A., or its successors-in-interest

In either case and for nearly any client scenario, we can provide upon request our suggested language guidelines regarding trustee powers and the use of affiliates.

To request a copy of our suggested language guidelines, contact a Raymond James financial advisor or Raymond James Trust directly at 800.248.8863, ext.72300.

YOUR PARTNER IN PROTECTING CLIENT LEGACIES

At Raymond James Trust, we've made it our mission to help clients build and protect their legacies. We look forward to doing the same for your client – and to serving as a valuable resource for you.

RAYMOND JAMES® *Trust*

RAYMOND JAMES TRUST

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER

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