

RAYMOND JAMES®

WHO TO CONTACT

We understand that situations arise, and whatever that situation is, our team strives to provide you with exceptional service when you need it most. Below we have listed some common topics and our “**Who to Contact**” list to ensure that this information is at your fingertips and you can get your questions answered quickly and efficiently.

TOPIC	CONTACT
Address Changes	Melissa Eskew / Debbie Macias
Account Updates	Melissa Eskew / Debbie Macias
Check Requests/ACH/Wires	Melissa Eskew / Debbie Macias
Online Access/Electronic Statements	Melissa Eskew / Debbie Macias
Statements	Melissa Eskew / Debbie Macias
IRA Distributions/Update Beneficiaries	Melissa Eskew / Debbie Macias
Trades/Transactions	Courtland Williams / Sonny Ballard
Estate Planning	Courtland Williams / Sonny Ballard
Investment Advice	Courtland Williams / Sonny Ballard
Insurance Evaluations	Courtland Williams / Sonny Ballard
Referrals	Courtland Williams / Sonny Ballard
Forgot Online User Name/Password	877-752-2237

TEAM MEMBERS

PHONE NUMBER

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