



LEFT TO RIGHT: Senior Vice President of Investments Shelly Church, CFP®, and Vice President of Investments Ilona Box, WMS, of the Church & Box Planning Group of Raymond James

## PAYING – AND PLANNING – IT FORWARD

Shelly Church's son, Kyle, was 6 years old when her family took part in its first American Heart Association (AHA) Heart Walk in Naples, Florida. Born with a congenital heart defect, Kyle would inspire Shelly to become deeply involved with the AHA, and after his passing in 2005, Shelly's commitment only grew. When the organization was looking for a strong leader for its efforts in the Tampa Bay area, it turned to Shelly, who in turn shared her story with Paul Reilly.

Thanks in large part to her efforts, Raymond James was a leading sponsor of the 2014 Tampa Bay Heart Walk, setting a firmwide goal of registering 60 teams and 750 walkers and raising \$200,000 – a goal that was easily exceeded thanks to the generosity of our associates.

"The awareness we created around our campus was just tremendous, and it's going to impact so many people's lives," said Shelly of the experience. "That's what's so touching. I think we created something really special."

In addition to the legacy of giving back inspired by her son, Shelly has also been a longtime advocate for her own professional legacy. Her succession plan began more than 17 years ago when she hired Ilona Box.

Starting as a service associate, Ilona expressed early interest in becoming an advisor and Shelly began mentoring her, giving her a hands-on introduction to the business and helping her develop a rapport with clients. According to Shelly, the process has been a natural progression – with Ilona playing an increasingly prominent role – that "turned out beautifully." The two have formalized their partnership with a written plan, which they've shared openly with their team and clients.

"It's a relief knowing our clients are going to be well taken care of. And, ultimately, our goal is for Ilona to find the person who will succeed her and begin that mentoring process all over again."