partners

Partnering to build your future






RAYMOND JAMES®

Individual solutions from independent advisors

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RAYMOND JAMES®

Your investment partners at Raymond James

When it's time to get professional about your wealth management

The Raymond James Partners Program gives you and your Financial Advisor access to the best investment minds in the business – Institutional-quality managers who individually manage Partners Program accounts based on your investment preference and risk and return expectations. It's a personalized professional investment management program designed for investors with more sophisticated investment needs.

Personal Investment Management for people like you

The Raymond James Partners Program is designed to address a diverse group of investors who share a common need for a professional investment manager to grow and protect their investment assets.

- Business owners, professionals and other individuals who are seeking an effective solution for their sophisticated investment needs.
- Estate beneficiaries, surviving spouses and others who may be unfamiliar with financial markets and who are unprepared for the responsibility of making important investment decisions.
- Successful investors with a sizeable investment portfolio who recognize the importance of having a professional wealth management strategy.
- Retirees who value their time and don't want to worry about the day-to-day responsibilities in managing their wealth.

No matter the reason, when the time comes to act and develop a new investment strategy, the Raymond James Partners Program offers you a personal investment solution to meet your growing wealth management needs.

A partnership every step of the way

The Partners Program is based on a detailed step-by-step process designed for your personal investment needs.

STEP 1 You and your Raymond James Financial Advisor complete a detailed Questionnaire that clarifies and focuses your investment objectives, time horizon, risk tolerance and return expectations. With this information, your Financial Advisor can develop your personal investment profile and determine an appropriate asset allocation strategy and investment diversification that's right for you.

STEP 2 This profile becomes your personal *Statement of Investment Policy* that details your asset allocation strategy and defines your investment needs.

STEP 3 You choose the right combination of investment managers for your portfolio to achieve your overall wealth management goals.

STEP 4 Regular monitoring and reporting by the Raymond James Investment Management Committee and an independent, third-party investment consulting firm lifts the management and administration responsibilities from your shoulders as we work on your behalf.

Peace-of-Mind Wealth Management Solution

Your money is in the care of a professional investment manager, but you're always in control. If your investment objectives or financial needs change, then you and your Raymond James Financial Advisor can rebalance your portfolio to ensure it remains aligned with your investment objectives.

The benefits of Professional Wealth Management

Tax-Efficient Solution

The Partners Program is a separately managed account. You hold each security in your portfolio to provide a tax-efficient investment solution for personal wealth and estate management planning.

Sophisticated Financial Management Advice

Together with your Raymond James Financial Advisor, you choose one or more investment manager(s) that best suits your investment profile. We have assembled a global team of institutional investment managers. Each with a different investment style and strategy.

Full-Service Account Management

You receive comprehensive quarterly statements and regular monitoring of your investments by the Raymond James Investment Management Committee and an independent, third-party investment consulting firm. Combined, they give you and your Financial Advisor a clear and understandable record of your investments and its performance.

Transparent Investment Fees

The Partners Program investment management fees are based on the value of your investments and are tax deductible for non-registered accounts. There are no trading or custodial charges and no annual fees for registered (RRSP & RRIF) accounts.

Unbiased Performance Monitoring

Each investment manager invests according to their area of expertise. Their performance is constantly monitored against a number of relative benchmarks to ensure your investment and financial goals are being achieved.

Partnering to build your future.

Raymond James designed the Partners Program for individuals who want to put a team of professionals in charge of investing for their future. Maybe it's time to reap the rewards of your own financial success and start looking forward to the freedom that your partners at Raymond James can give you.

Talk to your Raymond James Financial Advisor about our Partners Program. Discover the advantages it offers you and your family by providing an institutional wealth management approach for your sophisticated investment needs. Take charge of your investment future by leveraging the full strength of a partner who can make an important difference in successfully managing your wealth.