



WORKING WITH RAYMOND JAMES TRUST

Experience, stability and financial strength for a wide range of trust solutions

RAYMOND JAMES®

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 \$4.0 billion in trust assets among all 50 states and a number of foreign countries.

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

RAYMOND JAMES TRUST

24
*years of
experience*

4.1
*billion dollars
in total
trust assets*

RAYMOND JAMES

54
*years of
service*

535
*billion dollars
in total
client assets*

ABOUT RAYMOND JAMES

Raymond James Trust is backed by the financial strength and stability of its parent company, Raymond James Financial. 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 Financial has more than 10,000 associates worldwide and 6,800 financial advisors who manage 2.8 million client accounts valued at \$535 billion. With 114 consecutive quarters of profitability,* Raymond James consistently ranks among the best-managed and most client-focused corporations in respected national surveys.

Our success is based on the firm's unwavering commitment to its founding core values: client first, conservatism, independence and integrity.

* As of September 2016.

EXPERIENCE

In 1992 when Raymond James formally decided to offer trust services, large banks dominated the business. While traditional bank trust departments had a parochial and proprietary view of investing trust assets, we focused on designing a framework that provided not only excellent personal service, but also an investment architecture that allows for portfolios to be tailored to meet the needs of the individual trust and its beneficiaries.

Our innovative framework offers timely and accurate accounting systems, trust administrators with strong academic and professional credentials and a demonstrated commitment to the highest standards of client service. Equally important, our customized investing approach makes a full array of investment choices and instruments available for use in our trust portfolios.

With more than 24 years' experience, Raymond James Trust administers trusts exclusively designed for families and individuals – not institutions. We do not offer a “one size fits all” solution, but rather an individually tailored trust designed to meet personal needs both now and in the future.

PROCESS

Raymond James Trust professionals collaborate with attorneys, CPAs, brokers and asset managers to design and implement trusts based on client needs. We draw upon the collective knowledge and experience of our financial advisors, affiliated investment management entities and experienced trust staff to facilitate the safekeeping and security of assets.

At Raymond James Trust, our experts understand the complexities and nuances of issues related to a broad range of personal and court-created trusts. We are committed to serving clients for the long term – throughout their lives and for generations to come. Please contact us for more information.

ADVANTAGES

*Tenured and credentialed
Trust professionals*



*Sound financial
management through our financial
advisor partnerships*



*Tailored arrangements
to suit the needs
of benefit recipients*



*Responsive client and affiliate
partner service*



*The highest standards of
fiduciary conduct*

SERVICES

Oversight of trust assets



*Accounting and
record keeping*



*Reporting of trust receipts
and disbursements*



Tax reporting



*Performance reports
and statements*

LIFE WELL PLANNED.

RAYMOND JAMES®

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INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER

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