



Why work with a financial advisor?

RETIREMENT & LONGEVITY

A professional advisor can craft a tailored, holistic financial plan that supports your needs, goals and intentions for the future.

Choosing to work with a financial advisor can make a positive difference in your current and future life – and even for the next generations of your family. Your goals of building and preserving wealth, enjoying a comfortable retirement and leaving a legacy are dependent on how well your financial matters are managed. Let's delve into the details of what an advisor can bring to the table.



A personal relationship

Establishing a trusted professional relationship with a financial advisor can bring clarity to your financial future, simplify your financial life and bring a newfound sense of confidence regarding all investment matters.

By getting to know you, your aspirations and your current financial situation – and all of its details and complexities – your advisor can be in step with your life, advising you at every transition and turning point you encounter along the way.

Whether it's paying for a child's or grandchild's education, giving to your favorite charities, transferring wealth to the next generation of your family, selling a business or making sure you have the care you need as you age, a personalized plan takes into account all of your goals.

Your advisor can also serve as your sounding board and voice of reason, guiding you in making prudent financial decisions and helping you avoid missteps that could harm your long-term progress.



Sophisticated strategies

Financial planning goes beyond just managing your investments. Certainly, your portfolio needs to fit your goals, risk tolerance and time horizon, but a comprehensive financial plan considers all aspects of your financial life all the way through and beyond retirement.

Your advisor should have access to a sophisticated suite of products and services designed to address even the most complex financial needs. They can leverage the insights of professionals from research analysts and investment strategists to specialists in trust and estate planning, charitable giving strategies, cash and lending solutions, insurance protection, business services and more.

Your advisor can also help you identify appropriate financial strategies while collaborating with your tax and legal professionals – designed for a seamless approach to managing and preserving wealth.

Having a real person who you build a trusted relationship with, understands complex financial needs, is in step with your life and empathizes with your goals, needs and concerns is not something that can be easily replicated.



Tailored advice

It's important to remember that the advice you receive is personalized to you by an advisor who understands you and your family and cares about your financial well-being. Having a trusted financial partner there to guide you and help make objective recommendations that are in your best interest can prove to be invaluable.

When it comes to the important financial matters in your life, receiving generic advice that could apply to anybody will not serve you well. Your life and wealth needs are multifaceted, and they merit professional guidance that is customized accordingly.



Time to get started

The professional support provided by an advisor can help you navigate even your most complex financial needs while freeing you to spend time on the things – and the people – that matter most to you. Having an introductory meeting to determine if there is a good mutual fit would be a valuable first step.

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