

Services and Products Provided

Wealth Management	Investment Products & Strategies	Cash Solutions	Lending Solutions
Wealth Planning Financial Planning Consulting Pre & Post Retirement Planning Social Security Planning Longevity Planning Estate & Legacy Planning <ul style="list-style-type: none"> • Surviving Spouse • Family Plan Portfolio Consulting Rollover Solutions Charitable Planning Concentrated Equity Strategies Education Planning	Fixed Income <ul style="list-style-type: none"> • Brokered CDs • Corporate Bonds • Mortgage-Backed Securities • Preferred Securities • Treasuries & GSEs Equities Asset Management (SMA's, UMA's) Mutual Funds Closed-End Funds Exchange-Traded Funds Unit Investment Trusts Options Alternative Investments Structured Investments 529 Plans Annuities & Insurance <ul style="list-style-type: none"> • Annuities • Life Insurance • Long Term Care Insurance • Disability Insurance 	Capital Access Accounts Cash Sweeps Cash Strategies <ul style="list-style-type: none"> • Money Market Mutual Funds Credit Card Program <ul style="list-style-type: none"> • Premium Cards • Consumer Cards • Business Cards RJ Bank Deposit Accounts <ul style="list-style-type: none"> • FDIC Insured CDs (RJ Bank) • FDIC Insured Savings Accounts 	Securities Based Lending Margin Mortgages <ul style="list-style-type: none"> • Standard • Pledged Securities • FHA & VA Loans • Construction Loans • 1st Time Home Buyers Corporate & Real Estate Banking Fully-Paid Securities Lending

Raymond James & Associates, Inc. does not provide advice on tax, legal or mortgage issues. These matters should be discussed with an appropriate professional.

Raymond James Financial Advisors do not solicit or offer residential mortgage products and are unable to accept any residential mortgage loan applications or to offer or negotiate terms of any such loan. You will be referred to a qualified Raymond James Bank employee for your residential mortgage lending needs.

Lending Services provided by Raymond James Bank N.A. a fully chartered national bank affiliated with Raymond James Financial Services.

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