



Your partner for special needs trusts

Raymond James Trust has an experienced, dedicated team for special needs trust administration.

For anyone wishing to provide long-term stability for a loved one with a disability or special needs, or the recipient of a legal settlement or jury award whose government benefits eligibility would be impacted, a special needs trust can be vitally important.

That's why, at a time when some trust companies are shying away, Raymond James Trust remains committed to working with legal and care professionals to administer special needs trusts.

We're like you – dedicated to serving our clients.

More and more people are realizing the need for – and importance of – special needs planning and trusts. We've known all along.

And we're still here.

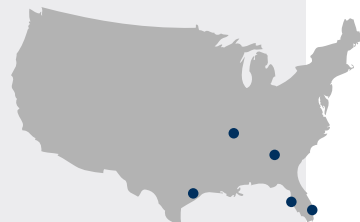
WHO WE ARE

Raymond James Trust is a nationally chartered trust company with a successful history of serving clients across the country. Founded in 1992 as a subsidiary of Raymond James Financial, Inc. – we are not owned by a bank – we are backed by the resources of a full-service financial planning and wealth management firm.

- 150+ trust professionals
- A team dedicated to special needs trusts

NATIONAL OFFICES

St. Petersburg, FL (home office)
Columbus, GA
Memphis, TN
Boca Raton, FL
Houston, TX



WHAT WE DO

Raymond James Trust meets distinct needs, creates tailored solutions and builds deep relationships. We do all that by providing expertise and experience, advanced accounting systems, customized investment strategies and quality service.

WHY WE DO IT

Our parent company, Raymond James, was founded on the belief that clients deserve someone to help them plan for their financial futures – not just buy stocks for them. Raymond James Trust has the same core values.

A special needs trust is designed, in part, to preserve and supplement a beneficiary's needs-based government benefits while benefiting from and enjoying trust assets to further enrich their lives. We think everyone seeking to provide for a loved one with a disability or special needs deserves a professional team committed to serving a beneficiary's best interests.

RAYMOND JAMES TRUST BY THE NUMBERS

Experience working with attorneys and professionals in all **50 states**

Ability to identify and coordinate benefits eligibility issues of special needs trust beneficiaries in all 50 states

Over **\$10 billion** in assets under management

\$325 million in **250+ accounts** related to special needs trusts in which we are the sole or co-trustee

\$1.2 billion in **1,700+ accounts** that are directed trust arrangements related to special needs trusts and settlement preservation trusts for the benefit of individuals with disabilities

As of September 2024

To learn more about Raymond James Trust and our dedication to serving clients, visit **raymondjamestrust.com** or call us at **800.248.8863**.

RAYMOND JAMES *Trust*

RAYMOND JAMES TRUST

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