A THOUGHTFUL APPROACH TO SHARING YOUR WEALTH

Our Private Wealth Trust program offers sophisticated trust and charitable services paired with elevated support.

RAYMOND JAMES

Sophisticated service for exceptional clients

You have dedicated years of your life to growing and preserving your wealth. To thoughtfully share the fruits of your labor with those you care for most, you need a deeply personalized approach to estate planning – and a partner in step with your wishes.

PRIVATE WEALTH TRUST

At Raymond James Trust, we understand the unique demands that accompany managing and sharing significant wealth. That's why we created our Private Wealth Trust program, designed for clients with $10 million or more within a Raymond James Trust account.

In addition to offering sophisticated trust and charitable services, the Private Wealth Trust program provides you with an elevated level of support:

- A dedicated trust officer available to meet in-person annually
- An estate settlement services specialist
- Asset management services available through the Raymond James Trust Portfolio Management Group (PMG)
- An experienced charitable giving consultant
- A complimentary estate plan review
- Customized onboarding process
- Dedicated tax preparer

DISCOVERING RAYMOND JAMES TRUST

Established in 1992, Raymond James Trust is a wholly owned subsidiary of Raymond James Financial. Today, we administer more than $10 billion in total trust assets, and can serve as trustee, co-trustee, custodian, personal representative or agent to the trustee in all 50 states.

To ensure you receive knowledgeable guidance, our specialized team consists of attorneys and trust professionals with extensive experience in administering and operating a wide variety of trusts – from marital to special needs trusts. Together, we are committed to serving you and your loved ones for generations to come.

BY THE NUMBERS*

$10+ billion in total trust assets

$2+ billion in charitable assets

$2+ billion in Private Wealth Trust assets

Over **30** years of service

5 offices across the U.S.:
St. Petersburg | Houston | Memphis
Columbus | Boca Raton

150+ Raymond James Trust associates

*as of 9/23/24

Contact your advisor to learn more about our Private Wealth Trust program or Raymond James Trust.

LIFE WELL PLANNED.

RAYMOND JAMES®

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