Professional Discretionary Portfolio Management

YOUR PORTFOLIO.

YOUR GOALS.

YOUR CHOICE.

RAYMOND JAMES®

PRIVATE INVESTMENT MANAGEMENT GROUP

TAKING THE CHALLENGE OUT OF MANAGING YOUR PORTFOLIO

Clients who benefit most from a discretionary portfolio management approach to their investments are typically individuals who realize their investments are too important to be a part-time consideration. You may be:

- A successful manager or senior executive
- A busy professional
- A business owner
- Retired, or
- A recent estate beneficiary

In today's increasingly complex and fast-paced financial markets, you know that managing a large investment portfolio can be a challenging full time job.

Our Private Investment Management service offers you professional expertise and peace of mind so you can devote your time to the other important things in your life.

Discretionary Portfolio Managers

The distinguished Portfolio Manager designation at Raymond James is reserved only for those advisors who have attained the highest professional standards of training and experience in the financial industry.

Our registered Portfolio Managers have the expertise and training to track your investments and provide the personalized advice, guidance and reporting that you deserve in order to achieve your financial goals.

You have an accountant for taxes and a lawyer for legal matters. Doesn't it make sense to also have a professional Portfolio Manager to bring a consistent, logical and disciplined approach to the management of your investments?

You deserve **a consistent, logical and disciplined approach** to portfolio management.

DEFINING YOUR GOALS

Your Portfolio Manager will assess your investment objectives, risk tolerance, financial goals and tax situation, as well as any other personal circumstances pertinent to your financial future. And then work with you to establish:

- an investment philosophy and objectives that are specific to you and your family's needs, now and in the future;
- your personal Statement of Investment Policy.

Your Statement of Investment Policy guides the management of your investments. It describes the allocation of assets and any restrictions applicable to your portfolio.

Building Your Portfolio

Based on your personalized Statement of Investment Policy, we build a portfolio to suit your needs and adjust it over time as necessary. Your customized portfolio of stocks, fixed income products and cash is separately managed and guided by your Raymond James Portfolio Manager.

You can specify investment restrictions to reflect your personal values and request specific buying or selling strategies that reflect your tax and income requirements.


Managing Your Portfolio

Your Portfolio Manager keeps up to date on economic and market conditions and maintains an in-depth knowledge of industry sectors and the changing corporate landscape. With access to the international research resources of Raymond James, and a thorough understanding of investment alternatives and tax planning strategies, your Portfolio Manager brings you personalized financial advisory services for the long term. And because this is a discretionary service, you are assured of efficient management and swift reaction as circumstances dictate.

Through regular contact, we ensure that your portfolio continues to meet the agreed upon long- and short-term investment objectives established in your Statement of Investment Policy. Our reporting to you is comprehensive, including detailed statements every month and reviews of your holdings each quarter. Personal meetings with your Portfolio Manager can be arranged as often as necessary.

It makes sense to have a professional Portfolio Manager to bring **a disciplined and focused approach** to your investments.

AT RAYMOND JAMES THE CHOICE IS YOURS

The convenience, peace of mind and undivided attention that come with having your own dedicated Portfolio Manager is now yours to choose.

Our Private Investment Management service is fee based, so there are no commissions on trades. Your fees are based on a percentage of the net value of the portfolio under management, and they are tax deductible for non-registered assets.

We focus on **your goals** as if they were our own. We are your trusted partner to **help you achieve your financial objectives** and dreams.

A leading North American Investment Firm

Raymond James is a leading North American independent investment firm offering a full range of professional investment services and products including:

- private client services,
- insurance and estate planning,
- research,
- investment banking,
- venture capital, and
- institutional sales and trading.

Since the firm was founded in 1962, Raymond James has been helping investors like you achieve their financial goals and dreams. Our predecessor companies in Canada have been doing the same for more than 75 years.

Find out more at raymondjames.ca.


RAYMOND JAMES®

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