

# Serve clients seamlessly on both sides of the border

## A Distinct Advantage: Cross-Border Capabilities

There are nearly one million American citizens residing in Canada and more than 800,000 Canadian citizens living in the United States. These individuals often have financial interests on both sides of the border, creating a strong demand for advisors who are licensed in both jurisdictions.

One of Raymond James Ltd.'s key differentiators is our robust cross-border service offering that enables advisors to seamlessly serve clients with financial interests and assets in both Canada and the United States.

Through dual licensing in both jurisdictions, you can be uniquely positioned to act as a single point of contact for:

- U.S. residents,
- Americans living in Canada, and
- Canadians residing in the U.S.

### Multi-Currency Platform

Our multi-currency platform allows you to manage assets and transactions in Canadian and U.S. dollars, as well as over 40 foreign currencies, giving clients the flexibility to invest in the currency of their choice and benefit from favourable exchange rates. U.S. resident clients also gain direct access to the Canadian marketplace.

### One Advisory Team. Two Countries. Peace of Mind.

With a dually licensed advisory practice, you're able to offer your clients peace of mind that comes with one advisory team for both sides of the border.

- One holistic cross-border financial plan
- Cross-border estate succession
- Unique expertise to help clients make decisions, navigate changing scenarios, and support a client's desire to be mobile

## Position Your Practice for Growth with Cross-Border Opportunities

As part of a dually licensed advisory team, you are equipped to manage cross-border assets and deliver truly integrated wealth solutions.

This capability not only differentiates your practice but opens the door to client conversations and planning opportunities that would otherwise be out of reach.