RAYMOND JAMES®

TOTAL WEALTH SOLUTIONS

# Empowering Advisors. Enhancing Client Relationships.

Our Total Wealth Solutions approach brings together the full breadth of our wealth management expertise. By collaborating with our team of specialists, you can strengthen your advisor offering and amplify your ability to grow and retain business. This is a strategic advantage for advisors who want to deepen relationships, grow faster, and deliver more.

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## Holistic, High-Touch Service


**Financial Planning**

Customized, solid financial plans based on your clients' goals and objectives

**Investment Management**

A wide range of investment strategies, including asset allocation, ongoing portfolio monitoring and rebalancing and risk assessment

**Charitable Giving Strategies**

A strategic approach to giving, including creating family foundations and maximizing impact to favourite charities through donor advised funds

**Insurance Solutions**

Proven insurance solutions designed to financially protect families and businesses

**Estate & Trust Services**

A full suite of services, powered by Solus Trust, to support beneficiaries and build lasting legacies. As Canada's largest independent trust company and an affiliate of Raymond James Ltd., Solus Trust offers the strength of a national platform with the freedom of independent advice

**Tax Solutions**

Support and expertise from maximizing tax efficiency to preparing tax returns

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# Why Advisors Choose Total Wealth Solutions

## Build a Stronger Practice

### Elevated Branding

Position yourself as part of a premier, multidisciplinary team. Highlight our specialists in your client materials to differentiate your practice and stand out in a competitive market.

### Expanded Relationships

Become the trusted, go-to advisor for the entire family. A comprehensive wealth strategy builds deeper connections and opens doors to generational relationships and asset consolidation.

### Greater Referrals & Influence

A broader, more sophisticated offering increases your appeal to Centers of Influence (COIs) and enhances client referrals. Whatever the client's needs, you're equipped with in-house experts to deliver.

### Growth Through Integration

Access to integrated, firm-wide expertise enables you to uncover more opportunities within your current book—delivering more value to each client.

## A Better Experience for Your Clients

### One Relationship. Complete Solutions

Clients benefit from having a single trusted relationship, managing all aspects of their wealth from investments to tax, estate, and retirement planning without needing to engage multiple firms.

### Trusted Team of Specialists

Gain access to a team of dedicated specialists committed to delivering leading wealth management strategies for your clients.

### Proactive, Personalized Planning

Our ongoing discovery process ensures clients' evolving needs are always anticipated and addressed—creating confidence at every stage of their financial journey.

### Long-Term Commitment

When clients experience this level of integration and care, they're more likely to consolidate assets and remain loyal to your practice.

Life Well Planned



June 30, 2025