

# [FA NAME], FINANCIAL ADVISOR

## Advisory Process

### Understand

- Establish Relationship
- Gather Information
- Review Scope of Services

### Design

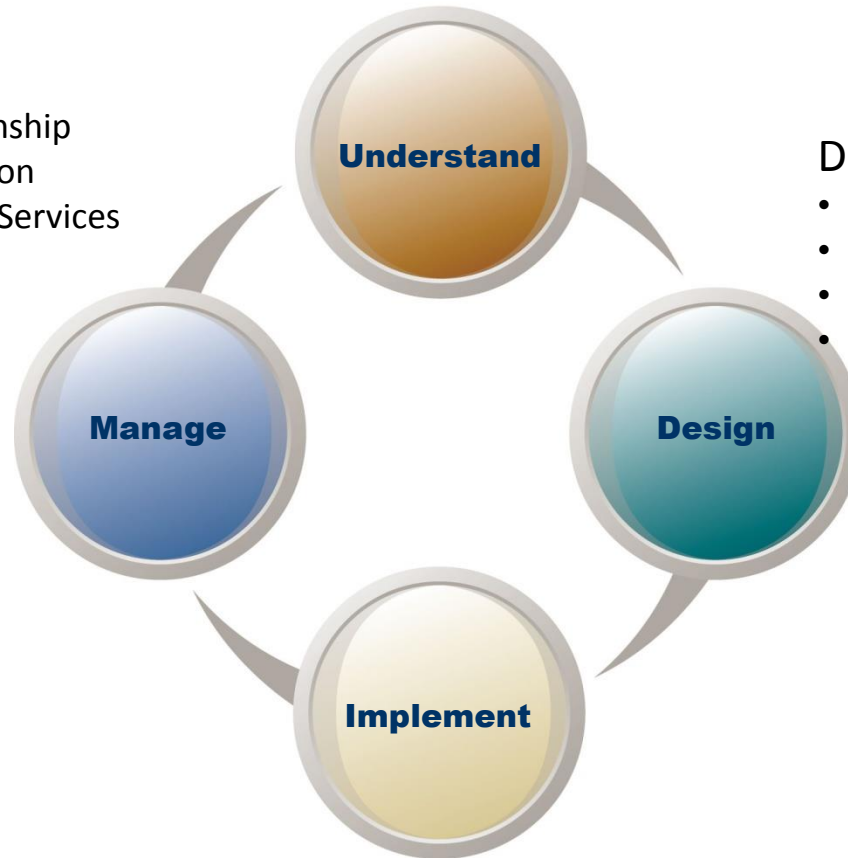
- Analyze and Evaluate Needs
- Collaborate with Professionals
- Educate on Finding and Solutions
- Confirm Recommendations

### Manage

- Monitor Progress
- Review and Revise
- Periodic Reviews

### Implement

- Adopt Raymond James Plan
- Coordinate with Professionals
- Employ Solutions



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