RAYMOND JAMES

Chichester

At Raymond James our business is you and your financial well-being

At Raymond James, Chichester we are committed to providing a personalised service and building long lasting relationships

No two clients are the same, so by offering a personalised service we combine our experience and expertise with your financial goals and objectives to create a portfolio bespoke to you. We want to help you live your life.

Whether you are an individual client looking to grow your wealth or you require a multi-generational, inter-spousal or ESG focused solution, the need for a truly bespoke service is now more important than ever, particularly with complex markets which are rapidly changing as the world becomes more connected, economically, socially, and culturally.

From cutting-edge technology and access to award-winning research, superior back-office administration, compliance and regulatory permissions, we have the expertise and infrastructure to help our clients achieve their financial goals, and live their lives.

Raymond James,Chichester is built upon the foundations of:

Financial security
of our clients' assets

Professional Investment
Management

Exceptional
client service

About Us

Raymond James, Chichester is one of over 3,000 branches of Raymond James internationally and combines the strength and stability of a secure financial services organisation, with the personal service of a local branch where the team have over 100 years' experience in financial services.

We are an independent branch of Raymond James Investment Services, the UK private client wealth management arm of the parent company Raymond James Financial, Inc., a diversified financial services company established in Florida,USA in 1962. Raymond James Investment Services has operated in the UK since 2001.

Throughout the history of Raymond James, a commitment to providing clients with exceptional service and knowledgeable advice has been a guiding tenet. As has the principle of conservative management. This principle is evident in the way that we at Raymond James, Chichester manage clients' portfolios, and the way we manage our business.

This approach has proven to be successful, and Raymond James is now a Fortune 500 company, listed on the S&P 500, with more than3,000 locations throughout the US, Canada and the UK.

Our UK head office is based in the heart of the financial district in the City of London, a central and convenient location to meet with London based clients, while our Chichester office provides a local base for everyday operations and meeting with local clients.

Our Commitment

We are committed to helping you achieve your unique goals. Our values are more than just the characteristics that define Raymond James; they are our pledge and promise to clients and to each other.

We put **clients first**

If we do what's right for our clients, the firm will do well and we'll all benefit.

We act with **integrity**

We put others above self, and what's right above what's easy. We believe doing well and doing good aren't mutually exclusive.

We think **long term**

We act responsibly, taking a conservative approach that translates into a strong, stable firm for clients, wealth managers and associates.

We value **independence**

We respect autonomy, celebrate individuality and welcome diverse perspectives, while encouraging collaboration and innovation.

> Raymond James seeks to be the first choice for investors through our commitment to providing superior service, transparent pricing and comprehensive choice

Our Offering

Raymond James, Chichester was established by a dedicated team of investment professionals to manage investment portfolios for private individuals, their family trusts, pensions and charitable foundations, as well as individual charities.

We are committed to providing truly bespoke portfolio management, along with exceptional client service. Working alongside your other advisors, we will tailor an investment management solution to help you achieve your goals.

Where required, we can introduce you to a panel of professionals with whom we have long-standing relationships, covering:

- **Accountancy**
- **Banking**
- **Independent Financial Advice**
- **Land Agency**
- **Legal**
- **Valuation & Antiques**

We work with:

Individuals, family trusts, pensions and charitable foundations

Individual charities

Execution only clients who wish to manage their own investments

Our Approach

Getting to know you

We will discuss your financial position and personal circumstances with you and spend the time to understand what you are seeking to achieve and the resources you have available, as well as your attitude and approach to risk. With these considerations, we will use our experience to design a strategy to help you meet your goals - whether you wish to produce income or grow capital, or a little of both, we can blend defensive or growth investments as necessary.

We will draw up a core asset allocation which diversifies your investments across different types of asset, geographic region and industrial sector, taking into account any investment restrictions you may have and taking care not to make any direct investments into these areas.

Managing your investments

We do not pigeon hole individuals based upon their risk profile, rather we treat individual portfolios on a case by case basis, applying an appropriate strategy for each client.

Our investment strategy is based upon our process of FEA (fixed interest, equities and alternatives) linked to your appetite for risk and applying a top-down asset allocation with a bottom-up stock and fund selection, our start point being global macro-economics.

Raymond James has significant in-house research capability and we have access to numerous external sources of information, research and market commentary. We also sit on an Investment Committee with other Raymond James Investment Managers, who meet quarterly. All of this combines to guide our selections of individual holdings for your portfolio.

Looking after your interests

Each client is unique, and their portfolio should reflect this. As a result, each wealth manager will only ever be responsible for a finite number of clients, because there are only so many hours in the day and each portfolio and client relationship deserves our time.

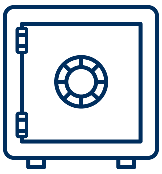
Our Solution

It all starts with your trusted wealth manager who knows you and understands your aspirations and goals.

Your Raymond James wealth manager's knowledge and expertise is complemented by full compliance and regulatory oversight, a breadth of institutional research, comprehensive reporting and the smooth administration of your account - all of this underpinned by a financially sound foundation.

Pershing

We have an arrangement with Pershing Securities Limited to act as custodian for your investments. Pershing is part of the Bank of New York Mellon Corporation, a global investments company with a presence in six continents, 35 countries, and over 100 markets.



Protecting your assets

Safeguarding your assets ranks among our highest priorities. In addition to choosing a financially sound and stable custodian, your cash and investments may also benefit from the UK's Financial Services Compensation Scheme. Your wealth manager will be happy to provide further details.

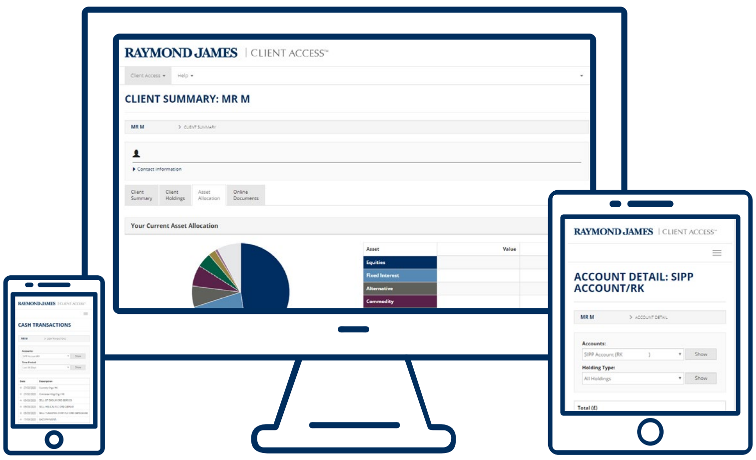
> Raymond James has established a tradition of excellence, by working together to deliver exceptional service to you

Client Access™

Raymond James' secure online portal gives you a convenient way to access all your Raymond James accounts, placing your investment information at your fingertips.

With an easy-to-use format, you are able to view your portfolio, including your holdings and the last two years' of transaction history.

Client Access™ provides you with the most up-to-date information on your Raymond James accounts – 24 hours a day, 7 days a week – via any computer, smart phone or tablet.



> All your investment information at your fingertips - 24 hours a day, 7 days a week

Can We Help You?

Over the many years that we have been helping clients we have identified several common scenarios.

You may find yourself in unfamiliar territory, which can be worrying, however, thanks to many years' experience we can draw on our knowledge and expertise to offer solutions to help you navigate through changes in your circumstances.

Wealth accumulation – If you are still working you may wish to engage a professional to manage your portfolio so that you can be sure that risk is being monitored and that the portfolio remains aligned to your future aspirations

Lump sums – You may have just downsized your own house, or sold an investment property, inherited some funds or sold a buy-to-let property, resulting in a one-off lump sum

Retirement – If you are retiring, we will work with you and your pensions advisor to manage your investments and provide a stable income in retirement, from an appropriate pension wrapper advised by your pensions advisor. If you do not have a pensions advisor we can introduce you to one

Trusts and Charities – If you are a Trustee of either a Trust or a Charity, we have experience of dealing with both and understand the aims and objectives of such entities. We take time to understand the background and can work with other professionals to ensure that all the legal and tax considerations are taken into account

Complex portfolios – If you have a number of different accounts and investments, you may feel they need to be simplified and perhaps explained to you fully. You may feel that you might like a more personal approach to your investments

Business sales – if you have sold a business, you may have fresh capital to invest and possibly existing investment that could be rationalised and reviewed

Income optimisation – If you have a significant amount in the bank or building society. You may need those funds to generate more income for you

Change in circumstance – If you or a relative is moving into care, and perhaps selling a house and there is a need to generate care home fees

Meet the Team

Greg Mahon
Chartered FCSI, Chartered Wealth Manager & Branch Principal
Greg.Mahon@RaymondJames.com | 01243 882 411
Greg manages investment portfolios for private individuals, associated family trusts and pensions, as well as charity clients.

Ian Creswick
Chartered MCSI, Senior Investment Analyst
Ian.Creswick@RaymondJames.com | 01243 882 414
As part of the investment team Ian has input into the investment process at both a macroeconomic level as well as stock and fund selection, helping to ensures portfolios are kept in-line with agreed mandates.

Rebecca Carvey
Chartered MCSI, Private Client Executive
Rebecca.Carvey@RaymondJames.com | 01243 882 413
Rebecca works closely with Greg and Ian as part of the investment team, ensuring that individual client strategies are monitored and maintained, as well as overseeing the function of Client Services Executive.

> Our team of local experts have over 100 years' experience in financial services and a shared passion for delivering an exceptional and personal service to all clients

Anna Carvey
Client Services Executive

Anna.Carvey@RaymondJames.com | 01243 882 412

Anna is responsible for all aspects of client administration including effective reporting and the answering of administrative queries, allowing the investment team to concentrate on the investment of client portfolios.

Camilla Eely
Office Manager

Camilla.Eely@RaymondJames.com | 01243 882 415

Camilla is responsible for the smooth running and management of the office, ensuring the team are able to operate with everything they require so they can concentrate on investment management and client care.

Contact Us

We would love to hear from you - get in touch to find out how we can help you reach your financial goals.

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> Our business is based on maintaining a commitment to superior service and supporting the delivery of high-quality bespoke solutions to help achieve your long-term goals

RISK WARNING: With investment, your capital is at risk

Nothing contained on this brochure constitutes investment, legal, tax or other advice and is not to be relied upon in making an investment or other decision.

The information on this brochure is believed to be correct at time of publish, but Raymond James cannot guarantee the accuracy, timeliness or completeness of any such information.

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