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# We'd like to introduce Raymond James

**A firm as committed to supporting your planning needs as we are.**

We put the needs of our customers first. And we chose to align with Raymond James because it, too, is dedicated to our customers' best interests. Commitment to outstanding service has been Raymond James' guiding tenet since the firm's establishment in 1962.

**Raymond James supports our solutions-based planning approach.**

Investments are a means to an end, whether the goal is a comfortable retirement or a legacy for future generations. That's why we have chosen to work with a firm that focuses on goals, not transactions. Their recommendations stem from a comprehensive assessment of your complete financial picture.

**Our capabilities are designed to meet your full range of needs.**

Raymond James financial advisors have the experience, resources and expertise to build unique solutions that are focused on your needs, such as:

- Retirement
- Legacy & estate
- Trust & charitable giving
- Tax planning
- Wealth & Asset Management
- Small business
- Insurance & Protection Planning

In each of these areas, Raymond James possesses particular expertise, as well as the products and support necessary to provide you with the service you deserve.\*



**A disciplined advisory process can help you develop a financial plan.**

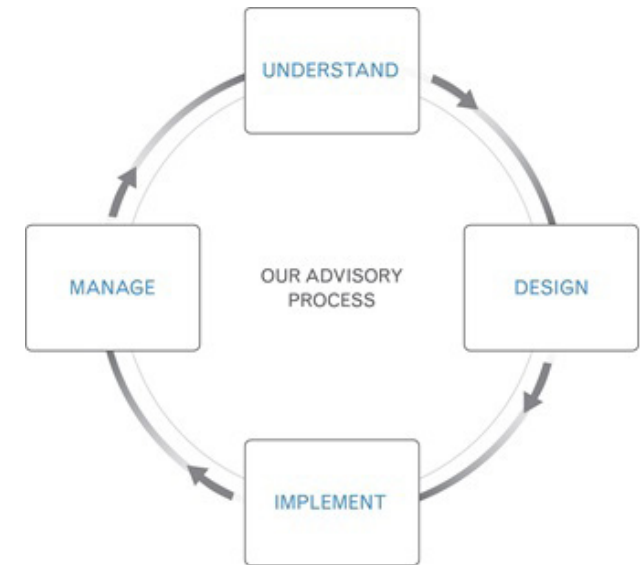
We emphasize the importance of counseling, identifying your needs and concerns, and building a customized financial solution designed to help meet your specific objectives.

**1. Understand your needs.** We begin by getting to know you and your family while gathering information about your current circumstances, your concerns, and your goals.

**2. Design a comprehensive plan.** Our team analyzes the information and designs solutions intended to help you reach your objectives. We present our recommendations to you, answer your questions, consider alternatives and outline the steps we need to take to implement your plan.

**3. Implement the plan.** Planning is put into motion. We execute your customized strategy using the extensive tools available to us through Raymond James.

**4. Manage the plan once it's in place.** This is an ongoing process in which we monitor the progress of your investments and periodically review your plan in light of changing circumstances and evolving objectives.



## Ready to get started?

**We are here to help you!**

Contact your local Liberty Bank branch office for a financial advisor near you, or call our Liberty Bank Investment Services toll-free at 888-570-0774.

\*Raymond James does not provide tax or legal advice. Please speak with a tax or legal professional before implementing any strategies.