

**Client Service Standard of Care**

<b>Fundamental Wealth Management</b> \$500,000-\$1,000,000	<b>Comprehensive Wealth Management</b> \$1,000,000-\$2,500,000	<b>Concierge Wealth Management</b> \$2,500,000+
<ul style="list-style-type: none"> <li>Comprehensive annual review with periodic check-ins</li> <li>Investment advice</li> <li>Ongoing portfolio monitoring</li> <li>Online Client Access</li> <li>Online Digital Document Organizer/Vault</li> <li>IRA RMD planning</li> <li>EverSafe Identity Theft &amp; Fraud prevention – free for clients</li> <li>Quarterly market update webinars</li> </ul>	<ul style="list-style-type: none"> <li>Comprehensive annual review with periodic check-ins</li> <li>Investment advice</li> <li>Ongoing portfolio monitoring</li> <li>Online Client Access</li> <li>Online Digital Document Organizer/Vault</li> <li>IRA RMD planning</li> <li>EverSafe Identity Theft &amp; Fraud prevention – free for clients</li> <li>Quarterly market update webinars</li> </ul>	<ul style="list-style-type: none"> <li>Comprehensive annual review with periodic check-ins</li> <li>Investment advice</li> <li>Ongoing portfolio monitoring</li> <li>Online Client Access</li> <li>Online Digital Document Organizer/Vault</li> <li>IRA RMD planning</li> <li>EverSafe Identity Theft &amp; Fraud prevention – free for clients</li> <li>Quarterly market update webinars</li> </ul>
<ul style="list-style-type: none"> <li>Financial goal planning</li> <li>Customized investment strategies</li> <li>Retirement needs analysis</li> <li>Education fund strategies</li> <li>Survivor needs/ Insurance review</li> <li>Long-term care planning</li> <li>Annual 401 (k) analysis</li> <li>Securities class action paperwork assistance</li> </ul>	<ul style="list-style-type: none"> <li>Financial goal planning</li> <li>Customized investment strategies</li> <li>Retirement needs analysis</li> <li>Education fund strategies</li> <li>Survivor needs/ Insurance review</li> <li>Long-term care planning</li> <li>Annual 401 (k) analysis</li> <li>Securities class action paperwork assistance</li> </ul>	<ul style="list-style-type: none"> <li>Financial goal planning</li> <li>Customized investment strategies</li> <li>Retirement needs analysis</li> <li>Education fund strategies</li> <li>Survivor needs/ Insurance review</li> <li>Long-term care planning</li> <li>Annual 401 (k) analysis</li> <li>Securities class action paperwork assistance</li> </ul>
<ul style="list-style-type: none"> <li>All-Inclusive account aggregation</li> <li>Performance summary reports</li> <li>Capital gain tax planning</li> <li>Beneficiary review on all retirement accounts and annuities</li> </ul>	<ul style="list-style-type: none"> <li>All-Inclusive account aggregation</li> <li>Performance summary reports</li> <li>Capital gain tax planning</li> <li>Beneficiary review on all retirement accounts and annuities</li> </ul>	<ul style="list-style-type: none"> <li>All-Inclusive account aggregation</li> <li>Performance summary reports</li> <li>Capital gain tax planning</li> <li>Beneficiary review on all retirement accounts and annuities</li> </ul>
	<ul style="list-style-type: none"> <li>Collaboration with CPAs and attorneys</li> <li>Estate planning</li> <li>Tax planning strategies</li> <li>Executive compensation analysis</li> <li>Income distribution strategies</li> </ul>	<ul style="list-style-type: none"> <li>Collaboration with CPAs and attorneys</li> <li>Estate planning</li> <li>Tax planning strategies</li> <li>Executive compensation analysis</li> <li>Income distribution strategies</li> </ul>
		<ul style="list-style-type: none"> <li>Charitable planning strategies</li> <li>Complex trust strategies</li> <li>Assistance in settling estates</li> <li>Business owner strategies and succession planning</li> <li>Wealth transfer education for the next generation</li> <li>Coordinate and attend meetings with family and tax and legal advisors</li> </ul>

Raymond James does not offer tax or legal services. You should discuss any tax or legal matters with the appropriate professional.

In a fee-based account clients pay a quarterly fee, based on the level of assets in the account, for the services of a financial advisor as part of an advisory relationship. In deciding to pay a fee rather than commissions, clients should understand that the fee may be higher than a commission alternative during periods of lower trading. Advisory fees are in addition to the internal expenses charged by mutual funds and other investment company securities. To the extent that clients intend to hold these securities, the internal expenses should be included when evaluating the costs of a fee-based account. Clients should periodically re-evaluate whether the use of an asset-based fee continues to be appropriate in servicing their needs. A list of additional considerations, as well as the fee schedule, is available in the firm's Form ADV Part II as well as the client agreement.

Investment fees vary depending on product and platform selected. Additional fees charged for outside managers if hired.

Investing involves risk and you may incur a profit or loss regardless of strategy selected.

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