Simplify.

Managing the daily ins and outs of your personal finances can be tedious and time consuming. Consider our SIMPLIFY service.

Is this service right for you?

- Are you a busy professional or entrepreneur? Focusing on your career or your business should be your main priority, and adding in the day-to-day management of your own personal financial affairs can take your attention away from where it needs to be.
- Are you retired? After retirement from a long and successful career, it can be difficult to juggle all of the personal financial matters that need your regular attention when you want to spend more time with your family, and travel to all of the wonderful destinations on your 'bucket list'. Having to manage your various sources of income and multiple expenses can be a little overwhelming at times, especially when other important life pursuits now take precedence.
- Are you caring for a loved one? Caring for others can be demanding in and of itself, without having the added duty of managing their finances. This responsibility can add complexity, especially if you are acting under a power of attorney, protection mandate, or court appointed guardianship.

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TRUST SERVICES

SIMPLIFY by Raymond James Trust Services aims to remove part of this burden from your life circumstances, whatever those may be. Whether you are managing your own finances or taking care of the personal affairs for a loved one, the time and attention required can draw away from other important aspects of your life. See the following page for how we can help.

SIMPLIFY Services

In SIMPLIFY, we provide the following services and support:

- **Bill Payment Support**
  - Includes up to 30 ad hoc & recurring monthly requests, including tax installments
  - Timely processing, tracking and monitoring of your personal payment obligations
- **Income Receipt Processing**
  - Includes collection, monitoring and administration of pension receipts, annuity payments, and other miscellaneous income items
  - Collect rental income, mortgage payments, and/or other loan payments
- **Recordkeeping**
  - Providing detailed statements of financial activity in your account
  - Dedicated trust associate as point of contact for any questions relating to the account
- **Important Document Review**
  - Regular reviews of your will and /or trust documents
  - Review of your power of attorney/protection mandate
  - Assistance with preparing your estate plan, coordinating with your lawyer/notary, financial planner or accountant to ensure it meets your specific circumstances
- **Assistance with Tax Preparation and Filing Coordination**
  - Collection and consolidation of personal and corporate tax receipts and supporting documents
  - Coordinating with your tax professionals to ensure your tax filings are prepared efficiently and on time
  - Collaborate with your Raymond James Financial Advisor to explore how certain investment decisions, prior to year-end, can assist in this overall planning process.

If you are interested in SIMPLIFY or any other of our many trust services, please speak to your Raymond James Advisor so they can put you in contact with one of our local trust officers.

For more information about our full suite of trust services, please visit:
www.rjtc.ca

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The SIMPLIFY service is provided by Raymond James Trust (Québec) Ltd. in the province of Québec and Raymond James Trust (Canada) in other provinces (where registered).