

# Secure a plan for your family's future

Raymond James clients can access a life and legacy platform dedicated to transforming the way your family gets organized with Everplans.

Establishing your legacy is so much more than passing on financial well-being to future generations; it includes your health wishes, your family information, and even your favorite recipe. That's why we're offering you access to Everplans, a highly secure online tool dedicated to transforming the way people get their families organized. This life and legacy platform is built to help you compile all the details about your will, trusts, doctors and more.

## WHEN YOU JOIN EVERPLANS, THEY CAN SAFEGUARD YOUR MOST CONFIDENTIAL DETAILS REGARDING:

### Your life

- Your family
- Employment
- Emergency contacts
- Homes & real estate
- Vehicles
- Digital world
- Pets

### Your legal documents

- Trusts
- Will

- Power of attorney
- Attorneys

### Your health and medical records

- Health insurance
- Advance directive
- Doctors
- Health information

### Your eldercare details

- Long-term care insurance
- Eldercare living wishes
- Care providers

### Your finances

- Life insurance
- Financial advisors
- Financial accounts & assets
- Benefits & pensions
- Disability insurance

### Your legacy wishes

- Burial, cremation and donations
- Letters to family and friends
- Funeral preferences

## EVERPLANS' SECURITY FRAMEWORK

Everplans approaches security using the following framework:

- Securing your data at rest
- Securing your data in transit
- Operational procedures to keep the site secure
- Strict limitations around administrative access to your information
- Two-factor authentication for end users

## STEPS TO SAFEGUARD YOUR INFORMATION

You can assign delegates to any of the sections of your profile so they have access to your information when needed, now or later. Customize which of your loved ones have access to which sections, ensuring your information goes to those who need it most.

Everplans takes careful, consistent precautions to keep your information secure. They regularly audit their environments and code for any security issues, and maintain strict internal procedures that allow their employees and administrators to view a limited set of your data should they help you access your account.

Let's plan for your family's future, together, with Everplans.

There is no form of a legal partnership, agency, affiliation, or similar relationship between Everplans and Raymond James, or their affiliates or agents, nor is such a relationship created or implied by the information herein. An introduction to Everplans by Raymond James does not constitute an endorsement, recommendation, or opinion as to the appropriateness of any relationship between Raymond James or any financial advisors and Everplans, or their affiliates or agents, or any advertising, marketing, social media use, or communications as a result of an introduction to Everplans by a Raymond James financial advisor. Raymond James is independent of Everplans.

**RAYMOND JAMES®**

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER  
880 CARILLON PARKWAY // ST. PETERSBURG, FL 33716