

# Enough isn't enough.

**MONEY HAS ITS VALUE, BUT THERE IS NO AMOUNT THAT CAN PROVIDE FOR WHAT REALLY MATTERS.**



You know the adage, “money can’t buy happiness”? It’s kind of our unofficial motto here. Not what you typically hear coming from a financial planning company. But it’s a principle we passionately stand behind.

Money can only go so far, regardless of how much of it you have. We are devoted not only to growing your capital to its utmost potential, but investing in your most valuable assets too. Assets such as character. Generosity. Family. Your joie de vivre.

LEARN ABOUT OUR PRINCIPLES



## **YOUR BOTTOM LINE CAN BE THE MARK YOU LEAVE ON THE WORLD.**

Family, stewardship and generosity are important assets—in addition to money. We are so passionate about it that in 2012 we began tracking the value of charitable donations we’ve helped our clients transfer from their JMA-managed Raymond James accounts to non-profits.

TOTAL CHARITABLE DONATIONS MADE BY THE FAMILIES WE SERVE.

## BENEFITING ORGANIZATIONS INCLUDE



# Let's chat.

## SOCIAL MEDIA



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