RAYMOND JAMES

Resources for a long and lively retirement

There's a lot your plan participants need to consider about how they will live in their retirement years – from choosing the right Medicare plan to the possibility of a healthcare episode to finding a ride to the grocery store. Raymond James has collaborated with the below services to help navigate this phase of life.

PLAN

The future your participants envision starts with making a plan today. Our longevity resources are designed to help unlock new levels of financial confidence through integrated goal planning. Learn how to lead thoughtful conversations about wealth and health with your participants and build a comprehensive plan that puts them at the center of every decision.

GOAL PLANNING & MONITORING

This sophisticated wealth planning tool shows your participants their full financial picture. It takes into account specific goals, investment strategy, risk tolerance, spending and saving rates, and displays the probability of achieving those goals.*

ARAG LEGAL NOW®

Legal events can happen throughout your life, and these oftentimes require time and money to resolve them. ARAG's Legal Now® empowers you to plan for the future through tailored legal advice and convenient estate planning document creation.

PROTECT

Longevity planning isn't just about investment management. It's also about protecting your plan participants and their loved ones, so they can make the most of what the future holds. Explore the services we offer to help preserve your participants' hard-earned savings, their identities and even their health.

EVERSAFE

EverSafe seeks to shield participants and their loved ones from financial fraud through a proprietary algorithm that monitors accounts for unusual activity. Alerts are sent to participants and anyone they designate as a trusted advocate. They can also protect loved ones by serving as their trusted advocate. And if any issues are detected, EverSafe helps manage the resolution process and create a recovery plan.

CHAPTER

Simplify the Medicare journey with Chapter, a trusted resource offering free, personalized support from licensed advisors. Chapter helps individuals compare all 24,000+ Medicare plans to find the most cost-effective option while ensuring coverage aligns with their preferred providers, doctors and medications. They also assist with pre-Medicare and under-65 health insurance (powered by Stride Health) across all 50 states, making it easier to make informed healthcare decisions at every stage.

CLEARMATCH

Help participants make the most of health insurance with ClearMatch, connecting them to unbiased agents to help compare their Medicare or individual health insurance options and find the most cost-effective plan – all while ensuring appropriate coverage for their preferred providers, doctors and medications. This resource does not support under 65 healthcare for the following states: AR, CA, CO, CT, DC, GA, ID, KY, ME, MD, MA, MN, NV, NJ, NM, NY, PA, RI, VA, VT and WA (and IL starting in 2026).

CARE

As longevity planning professionals, we understand the costs and commitment that come with caregiving. Whether your participants are seeking care support, serving as a caregiver or partnering with loved ones for family care management, our resources help them navigate every aspect of health and wellness.

BROADSPIRE CARE MANAGEMENT

Help participants plan for the greatest financial factors in retirement – housing and healthcare – with Broadspire Care Management. One of their dedicated care experts can make in-home assessments, recommend and facilitate strategies for aging in place and help address additional care needs, from minor home modifications to finding the best memory care facility.

PINNACLECARE

A concierge health service, PinnacleCare maintains relationships with top-ranked medical centers across the country and works with your participants to source the best treatment options, schedule appointments, seek second opinions from trusted specialists and more.

CARILOOP

Caregiving comes in many forms and often brings unexpected challenges that can affect your time, finances and emotional well-being. Cariloop works with you to provide personalized guidance, expert support and digital tools to help you navigate care decisions with confidence. Whether you're caring for a child, an aging parent or someone in between, Cariloop helps make the journey more manageable and less stressful.

SHARE

A legacy is so much more than what you'll one day leave behind. It's about passing on cherished memories, sharing your stories and helping instill your values in future generations. It's about creating a gift that extends far beyond your wealth.

EVERPLANS

A meaningful legacy includes organizing and sharing critical information with loved ones – and that's where Everplans can help. Through its step-by-step process, Everplans enables participants to organize important documents – from wills and end-of-life wishes to their favorite family recipes – in a secure online database, which can be shared with trusted family and friends.

RAYMOND JAMES IS HERE FOR YOUR PARICIPANTS
AS THEY PLAN FOR AND LIVE THROUGH RETIREMENT.

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*IMPORTANT: The projections or other information generated by Goal Planning & Monitoring regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results and are not guarantees of future results. Results may vary with each use and over time. Asset allocation does not guarantee a profit nor protect against loss.

RAYMOND JAMES®

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