



Considerations for Naming Raymond James Trust as Fiduciary

At Raymond James Trust, we are dedicated to helping clients build and protect their legacies, serving as a valuable resource while supporting you and your client throughout the drafting process.

When drafting trusts in which Raymond James Trust is to serve as fiduciary, please consider including the following or substantially similar topics. Please note that each account is reviewed independently, and Raymond James Trust respectfully reserves the right to decline its appointment at the time of incapacity, death, or other triggering event, regardless of the inclusion of the following provisions. Additionally, Raymond James Trust will not serve as an attorney-in-fact under a general power of attorney document, regardless of whether it is durable, springing, or otherwise.

PREFERRED TOPICS (when applicable)

LEGAL NAME AND SUCCESSORS

When referring to Raymond James Trust in the governing document, please utilize the correct legal name along with successors in interest, as follows:

Raymond James Trust, N.A., or its successors in interest

ACCEPTANCE OF REAL PROPERTY AND ENVIRONMENTAL PROTECTIONS

Please include a provision that allows the Trustee to accept the real property owned by the Trust and allows the Trustee to take any action as it deems appropriate to abate actual or alleged environmental law violations at the Trust's expense.

RELEASE OF LIABILITY OF SUCCESSOR TRUSTEE

Please include a provision relieving the Trustee from liability related to the acts or omissions of its predecessor as well as the duty to inquire as to any acts or omissions of its predecessor.

POWER TO RESIGN

Please include a provision allowing the Trustee to resign upon notice to the grantor/beneficiaries.

POWER OF RAYMOND JAMES TRUST, N.A., TO ENGAGE AFFILIATES

Example: Raymond James Trust, N.A., shall have the power, in addition to and not in substitution for all powers conferred on the Trustee hereunder and by law, in its sole and absolute discretion without Court order or approval, to engage with or without discretionary powers any appropriately licensed or registered person, corporation, partnership or other entity affiliated with Raymond James Trust, N.A., or its parent, affiliate(s) or subsidiaries (“Affiliated Entities”) to render services to any trust hereunder, including, without limitation: investment management services; brokerage services; and custodial services. A current list of Affiliated Entities may be obtained, upon the Grantor’s or beneficiary’s written request. The trust may pay Affiliated Entities compensation for such services to the trust.

TRUSTEE COMPENSATION

Please make a reference to Raymond James Trust’s published fee schedule.



For clarification on any of the topics above, please contact your Raymond James financial advisor or trust consultant.

RAYMOND JAMES® *Trust*

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