

# Account Overview

## Asset Management Services

	DESCRIPTION	INVESTMENT VEHICLES	ACCOUNT MINIMUM	PRODUCT FEATURES
<b>Freedom MF</b>	AMS-managed allocation and fund selection	Mutual Funds	\$50,000	Fee-based account with multiple investment objectives
<b>Freedom ETF</b>	AMS-managed allocation and ETF Selection	Exchange-Traded Funds	\$50,000	Freedom platform with more emphasis on cost and tax efficiency*
<b>Freedom Retirement Income Solution</b>	AMS-managed allocation and fund selection	Mutual Funds	\$100,000	Freedom platform with income focus and attention to longevity risk
<b>Freedom UMA</b>	AMS-managed allocation and SMA/fund selection	Separately Managed Accounts; Mutual Funds	\$300,000	Freedom platform constructed with SMAs/Mutual fund diversification
<b>Managed Completion Portfolios</b>	AMS-managed allocation and fund selection	Mutual Funds	\$50,000	Fee-based account with multiple investment objectives
<b>RJCS</b>	Advisor-driven SMA accounts with optional AMS models	Separately Managed Accounts	\$100,000	SMAs with advisor-driven allocation and manager selection
<b>Russell</b>	Russell-managed allocation and fund selection	Mutual Funds	\$50,000	Pre-asset allocated models with Russell handling portfolio construction
<b>Opportunity</b>	Advisor and client driven; discretionary or non-discretionary	Open	\$25,000 plus transaction fees	Fee-based account with allocation and product choice
<b>Ambassador</b>	Advisor and client driven; discretionary or non-discretionary	Open	\$100,000	Fee-based account with allocation and product choice

All investing involves risk and may involve a profit or loss, and diversification does not ensure a profit or protect against a loss. All factors including strategies, objectives, risks, charges and expenses should be considered carefully before investing. This is a designed for educational purposes and should not be construed as a recommendation of any investment strategy. For advisor use only.

Please refer to the Raymond James for additional information and disclosures. Tax or legal matters should be discussed with an appropriate professional.