

RJFS Independent Business Consulting

Of the many opportunities independence presents, business ownership is one of the most rewarding – and often one of the most challenging. That’s why we offer transitioning independent advisors more than the strength of our firm and the full resources of our national partners.

As a benefit of affiliation, Raymond James offers you the expertise of a dedicated business consulting manager to help you build the practice you’ve always envisioned. Offering a unique degree of experience and insight, our business consulting manager equips you with personalized guidance throughout each step of establishing and building your business, providing guidance on ownership decisions including:

BUSINESS STRUCTURE/PLANNING

- OBA Entity Selection and Taxation
- Timeline Considerations
- Multi-advisor Branch Structuring
- Sharing Expenses Between Partners
- Start-Up Expenses
- Flow of Funds
- Cash Flow Planning
- Key Questions to Ask Your CPA
- Business Continuity Planning

REAL ESTATE

- Real Estate Market Survey
- How to Execute a Lease
- Lease Negotiation Techniques
- Utilizing an Independent Tenant Broker
- Office Signage Requirements
- Furniture Options

INSURANCE

- Structuring Health Insurance
- Group Life Insurance
- Disability Insurance
- Business Owner Insurance Policies
- Errors and Omissions Coverage by RJFS

COMPENSATION

- Structuring Employee Compensation
- FA Affiliation Models
- Structuring Overrides on FAs
- Guidance on Compensation Benchmarks
- Commonly Used Incentive Packages

BUSINESS OPERATIONS

- Bookkeeping and Payroll Considerations
- P&L Guidance
- HR Best Practices
- 3rd Party Vendor Discounts

To learn more, contact your business consultant
at **727.567.5550** or **IBC@raymondjames.com**
