DAVIS
EXECUTIVE WEALTH MANAGEMENT
at Steward Partners

Our Services

Investment Planning	Retirement Planning	Estate Planning & Philanthropy	Risk Mgmt. & Insurance	Cash Flow & Budgeting	Family Services	Corp. Executive Services
Portfolio Management & Risk Analysis	Retirement Goal Setting	Charitable Giving	Review of Existing Policies	Cash Flow Analysis	College Savings Planning	Single Stock Strategies
Asset Allocation & Diversification	Social Security Analysis	Asset Protection Analysis	Life Insurance Needs	Expenses & Budgeting	529 College Savings Plans	Restricted Stock/Rule 144 Transactions
Concentrated Stock Analyses	Business Planning		Long Term Care Insurance	Debt Management	Roth IRAs for Children	10b5-1 Trading Programs
Investment Risk Control Strategy	IRA Contributions & Conversion		Disability Insurance	Planned Purchases	Gifting	Stock Option Finance and Planning
Second Opinion Reviews	401(k) Management & Employer Sponsored Plans		Liability Coverage	Emergency Savings	Elderly Planning	
Portfolio Stress-Testing	Annuities & Pensions			Mortgage Review	Legacy Planning	
	RMDs & Withdrawal Strategies			Lines of Credit		

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For Important Disclosures, Please See Next Page

Disclosures

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Steward Partners Investment Solutions, LLC ("Steward Partners"), its affiliates and Steward Partners Wealth Managers do not provide tax or legal advice. You should consult with your tax advisor for matters involving taxation and tax planning and their attorney for matters involving trust and estate planning and other legal matters.

When Steward Partners Investment Solutions LLC, its affiliates and Steward Partners Wealth Managers provide "investment advice" regarding a retirement or welfare benefit plan account, an individual retirement account or a Coverdell education savings account. Steward Partners is a "fiduciary" as those terms are defined under the Employee Retirement Income Security Act of 1974, as amended ("ERISA"), and/or the Internal Revenue Code of 1986 (the "Code"), as applicable. When Steward Partners provides investment education, takes orders on an unsolicited basis or otherwise does not provide "investment advice", Steward Partners will not be considered a "fiduciary" under ERISA and/or the Code. Tax laws are complex and subject to change. Steward Partners does not provide tax or legal advice. Individuals are encouraged to consult their tax and legal advisors (a) before establishing a Retirement Account, and (b) regarding any potential tax, ERISA and related consequences of any investments or other transactions made with respect to a Retirement Account.

Borrowing against securities may not be appropriate for everyone. You should be aware that there are risks associated with a securities based loan, including possible margin calls on short notice, and that market conditions can magnify any potential for loss.

Important Risk Information for Securities Based Lending: A line of credit backed by securities, such as a securities based line of credit or Margin account may not be suitable for all clients and investors. Borrowing on securities backed lending products or Margin accounts and using securities as collateral may involve a high degree of risk including unintended tax consequences and the possible need to sell your holdings, which may lead to a significant impact on long-term investment goals. An investor can lose more funds than he or she deposited in the account. Market conditions can magnify any potential for loss. If the market turns against the client, he or she may be required to quickly deposit additional securities and/or cash in the account(s) or pay down the loan to avoid liquidation. Clients and investors may not be entitled to choose which securities or other assets in his or her account are liquidated or sold to meet a Call. The firm can increase its maintenance requirements at any time and is not required to provide advance written notice. Clients and investors may not be entitled to an extension of time on Calls. The securities in the Pledged Account(s) may be sold to meet the Collateral Calls and the securities in a Margin account can be sold to meet Margin Calls; the firm can sell the client's securities without contacting them. Increased interest rates could also affect LIBOR rates that apply to your line of credit causing the cost of the credit line to increase significantly. The interest rates charged on a line of credit are determined by (i) the market value of pledged assets and the net value of the client's non-pledged Capital Access account or (ii) the line of credit amount. The interest rates charged on Margin accounts are determined by the amount borrowed. Please visit sec.gov/investor/pubs/margin.htm for additional information.

The proceeds from a securities based line of credit cannot be (a) used to purchase or carry securities; (b) deposited into a Raymond James investment or trust account; (c) used to purchase any product issued or brokered through an affiliate of Raymond James, including insurance; or (d) otherwise used for the benefit of, or transferred to, an affiliate of Raymond James. Raymond James Bank does not accept RJF stock or any securities issued by affiliates of Raymond James Financial as pledged securities towards a line of credit. Lines of credit are provided by Raymond James Bank. Securities based line of credit and structured lines of credit provided by Raymond James Bank, Raymond James & Associates, Inc. and Raymond James Financial Services, Inc. are affiliated with Raymond James Bank, a federally chartered national bank.

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