

Householding/Relationship Management

Relationship Management Center (RMC) enables you to:

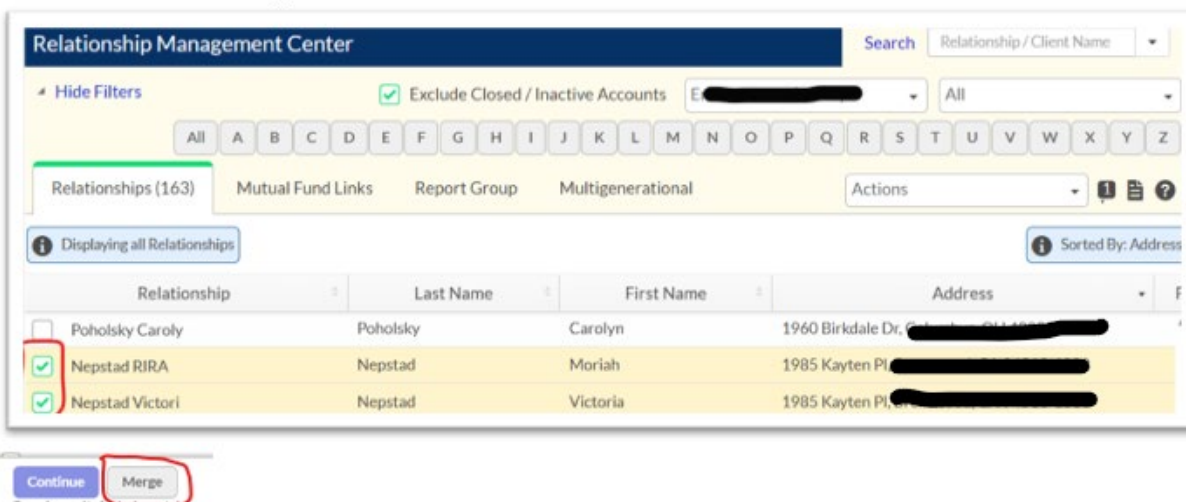
- Group (Household) related accounts
- Address mail packets
- Select statement and trade confirm types
- Manage fee preferences for accounts and relationships

Log into the Raymond James system

Go to **My Clients / Relationship Management Center**

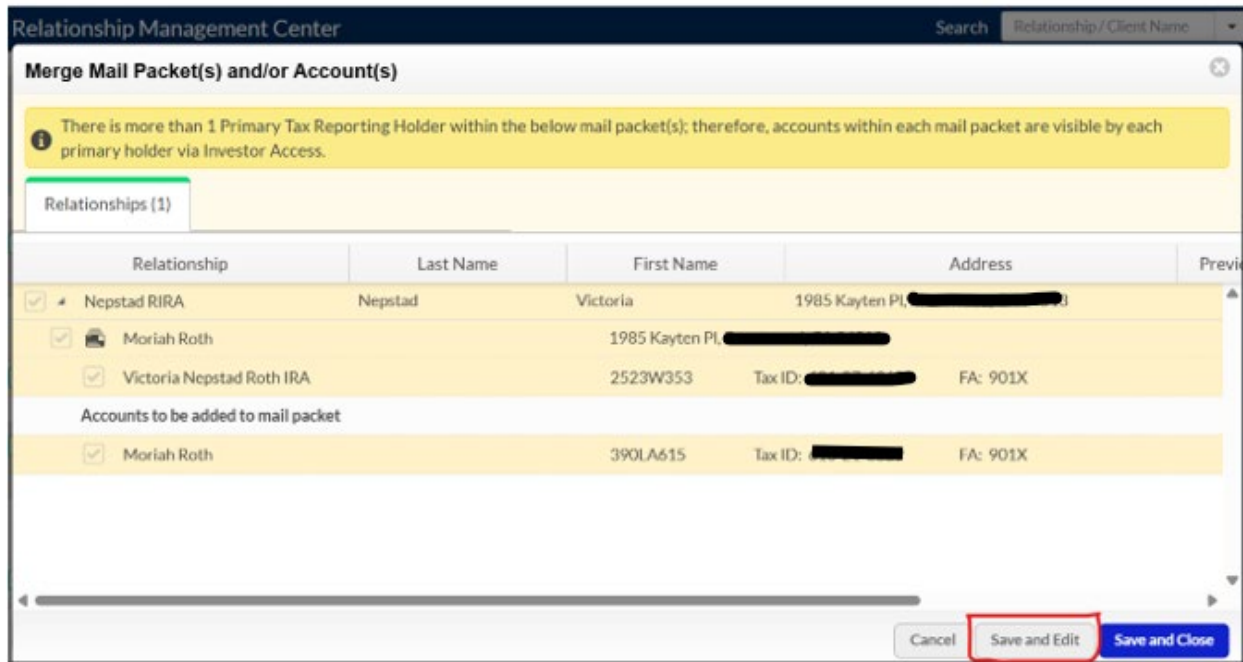
Group (Household) Accounts

1. Select **Advisor(s)** or **ALL** to choose which accounts you want to see.
2. Click **Address** section to sort list by addresses.
 - a. Look for accounts with same address
 - b. Determine if accounts with the same address should be in the same Household
3. **Merge accounts** into same Household.
 - a. Check box of each account that should be in same Household
 - b. Click **Merge**



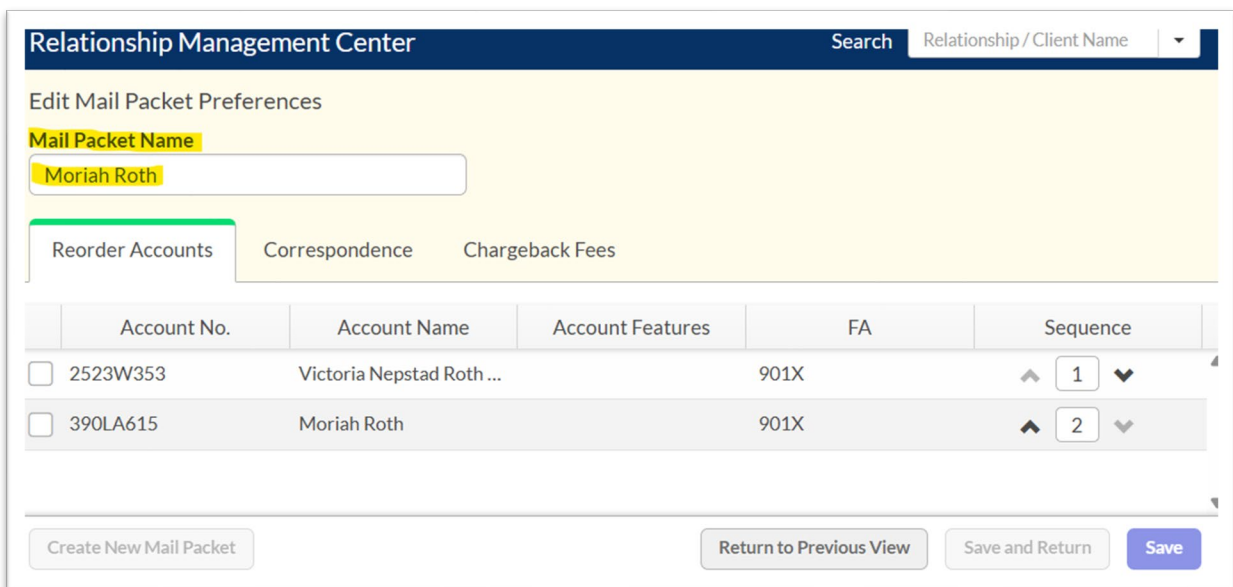
Address Mail Packets

1. **Confirm Merging** of accounts into same Household and mail packet.
 - a. Click Save and Edit.



2. Update Mail Packet Name

- a. The Mail Packet Name will be the short name of an account. Update the Mail Packet Name in the top box to read the first and last name(s) of the clients.



Updated Mail Packet Name:

The screenshot shows a web interface titled "Relationship Management Center". Below the title, there is a link for "Edit Mail Packet Preferences". Underneath, the "Mail Packet Name" is displayed in a text box as "Moriah & Victoria Nepstad".

3. Update Account sequence in mail packet.

- a. The order of the accounts in the mail packet can be moved by using the arrows under Sequence.
- b. Click Save and Return once mail packet updates are complete

The screenshot shows the "Reorder Accounts" tab selected. It contains a table with the following data:

Account No.	Account Name	Account Features	FA	Sequence
<input type="checkbox"/> 2523W353	Victoria Nepstad Roth ...		901X	1
<input type="checkbox"/> 390LA615	Moriah Roth		901X	2

At the bottom of the interface, there are buttons for "Create New Mail Packet", "Return to Previous View", "Save and Return" (highlighted with a red box), and "Save".

The Relationship Management system has a lag time. Please allow several hours for the changes and updates to show in the system.

Best Practice - Review Relationship Management at least monthly before statements are sent

Statement & Confirmation Choices and Fee Management

1. Update Relationship name

- a. Click Edit Preferences to go to new screen
- b. Update Relationship name to: Last Name, First & First (if applicable)

Relationship Management - RJ

Relationship: Nepstad RIRA Level 2
 Aggregate Cash Level 1
[Create Multigenerational Relationship](#) Edit Preferences

Mail packet: Moriah & Victoria Nepstad 1985 Kayten Pl, Brentwood, CA 94513 Edit Preferences

Account No.	Account Name	Account Features	Aggregate Cash Level	FA Number
<input type="checkbox"/> 2523W353			1	901X
<input type="checkbox"/> 390LA615			1	901X

Merge Move to Existing Relationship Move to New Relationship Manage Related Link Types Close

Relationship Management Center Search Relationship / Client Name

Edit Relationship Preferences
 Relationship Name Nepstad, Moriah & Victoria

Correspondence Chargeback Fees

	Statement			Realized Gain/Loss		Confirm		Frequency	Paperless?
	Comprehensive	Executive	Paperless?	Quarterly	Monthly	Multiple	Single		
Relationship: Nepstad, Moriah & Victoria	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Moriah & Victoria Nepstad	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Victoria Nepstad Roth IRA - 2523W353		<input checked="" type="checkbox"/>	Y	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Daily	N
Moriah Roth - 390LA615		<input checked="" type="checkbox"/>	Y	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Daily	N

2. Update Statement and Confirmation Choices

- a. Check boxes for preferences on statement and confirmation options

3. Review Chargeback Fees

- a. Chargeback Fees can be reviewed and changed by clicking the Chargeback Fee tab
- b. Click Save and Return

Unmerge Mail Packets

There may be a situation where mail packets in the same relationship need to be separated. Once the steps above are completed, the Household will stay together but mail can be separated. On the main Relationship Management Center page, check the household that needs the packet separated. Check the account(s) that should be in new mail packets and click Create New Mail Packet. This will separate the packets. Be sure to update the mail packet name to reflect the change.

Multigenerational Households

A multigenerational relationship can be established for relationships with \$1 million or more in assets to extend waivers for annual fees to lineal family members, such as adult children, parents, and grandchildren. The level of the highest-value relationship in the multigenerational link will be used to determine waivers for the other relationships in the link and must be over \$1 million in order for benefits to be extended to other, related relationships. Assets will not be aggregated. Instructions for creating multigenerational links can be found in RJNET using the Training link below.

Mutual Fund Account Linking

Relationship Management system provides a Mutual Funds linking process. The purpose of MF Linking is to establish a group of accounts that can be linked for breakpoint accumulations. Mutual Fund accounts that are eligible to be linked based on family relationships as determined by Raymond James. More information and instructions can be found on RJNET. <https://rjnet.rjf.com/ResourcesandSupport/ClientAccountResources/Linking/MutualFundAccountLinkingGuidelines>

Raymond James Resources, Training & Support

Training videos and Relationship Management processes can be found on RJNET. <https://rjnet.rjf.com/ResourcesandSupport/CorporateServices/Technology/Software/AccountManagement/RelationshipManagementCenter>