



**RAYMOND PATSY
& ASSOCIATES, LLC**

Financial Planning and Investment Management Services

**Personal and Business
Financial Planning**

Cash Management, Net Worth
and Insurance Planning

College, Retirement and
Investment Planning

Income Tax Planning and
Preparation

Estate Planning

Multi-Generational Family
Financial Planning

Other areas unique to your
situation

**Trust Administration and
Management** (provided by
Independent Trust Companies)

Banking Services
(provided by EverBank.)
www.everbankpro.com)

**Individual and Corporate
Investment Management
Services**

Individual and Business
Retirement Plans
IRA's, 401k, Profit Sharing,
IRA Rollovers

Investment Advisory
Services, Asset Allocation and
Portfolio Management

Financial Planning and Investment Management can be provided separately or on combined, coordinated basis.
Our goal is to help you design and implement financial planning and investment strategies to help you achieve your financial goals, simplify your life, and provide you peace of mind.