



Your trusted caregiving partner

Raymond James has partnered with Cariloop to support you in life's most demanding role. Cariloop helps you navigate the challenges of caring for a child, an aging parent or someone in between with confidence and clarity.

Managing the financial, emotional, and logistical aspects of caregiving is a key part of a well-rounded longevity plan. Use the Caregiver Support Platform® to access complimentary tools and resources, including:

EXPERT CAREGIVING SUPPORT PLANS – Step-by-step guidance to remove the guesswork from caregiving. These plans serve as a starting point, offering organized and detailed guidance on specific caregiving topics. They provide a self-led journey with clear descriptions and actionable tasks.

AN EXTENSIVE RESOURCE LIBRARY – Weekly content from licensed coaches covering a wide range of topics, including:

- Infants and childcare
- Education for K-12 and college students
- Neurodiversity and disabilities
- Women's health needs
- Chronic illness care
- Elder care
- Mental health support for all ages
- Legal planning and insurance navigation

ORGANIZATIONAL TOOLS – Secure document storage, medication management, notes and planners to help share responsibilities. You can create and assign tasks to family members and friends, maintain a list of providers and access these tools via a mobile app. All features are SOC 2 Type II and HIPPA compliant, as well as WCAG 2.2 certified.

How do I get started?

Activate your account: Go to plan.cariloop.com/enrollment/raymondjames

Confirm eligibility: Enter your advisor's name, email address and code: RJLP

Access your support: Enter your email and create a password to access extensive features of the Caregiver Support Platform®

COMMUNITY CHANNELS – Engage in peer support and expert-led conversations on:

- Childcare and development
- Aging loved ones
- Caregiver wellness
- Education for children and young adults
- Neurodivergence and disabilities
- Insurance and cost of care
- Grief and loss

NEED EXTRA SUPPORT? CONNECT WITH A CARE COACH – For \$249/month, you can upgrade to get unlimited access to licensed professionals who provide personalized guidance on caregiving challenges. Whether it's researching care options, breaking down costs or finding resources, Care Coaches help you save time, reduce stress and regain control. They stay involved every step of the way, offering empathy, expertise and practical solutions so you can make confident decisions.

Connect with Cariloop

To learn more about Cariloop, choose one of the convenient options below to connect:



Talk to your advisor for more information and personalized guidance.



Call 972.232.7561
(English or Spanish).



Email support@cariloop.com
for technical assistance.



Looking Ahead

Planning for the future is essential for achieving your financial aspirations. With Cariloop and the guidance of your Raymond James advisor, you can confidently navigate the complexities of your financial future. Contact your advisor to learn more.

RAYMOND JAMES

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER
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