

AB Default Web Copy

Friday, June 10, 2016 12:32 PM

DEFAULT COPY GUIDE

Silo Site Map

Home Page

An elevated advisory experience

We believe that financial advisory services should be shaped by the unique needs of each client we serve, from individuals to families to high-caliber institutions. Our personal approach and robust capabilities enable us to create customized investment solutions and deliver a superior standard of service with every investment solution we present. Whether managing your personal wealth or elevating your business to the next level, our team remains focused on the strategic thinking and opportunities that will help drive you toward success.

Our Approach – Individuals

Expertise for the big picture and finer details

Our experienced wealth management team serves a variety of clients, playing an important role in your inner circle. Whether we are providing professional investment consulting or complete financial planning, you can rely on us to take care of the big picture and the finer details with an approach that is as disciplined as it is strategic. It all starts with developing a deep understanding of where you are in life. From there we aim to anticipate your needs, offering personalized attention, the highest level of service with integrity, and the advocacy needed on your side of the table. Our rigorous process ensures a comprehensive plan.

Assess

As we listen to you, we learn about your objectives, your perspective on risk and your liquidity needs. We then devise a plan to support your personal goals through professional investment management and strategic planning.

Create

Using the details you have confided in us and our access to high-caliber research and analysis, we narrow down a selection of investments and determine an allocation tailored to your financial life. We then present our recommendations and outline the steps needed to implement your plan.

Implement

With this approved plan, we put it into action by choosing investment vehicle types and services uniquely suited to your needs, goals and risk tolerance. We craft your portfolio carefully, making the most of the choices available to serve your precise situation.

Manage

After establishing your plan, we continue to monitor its progress toward your objectives and ensure it keeps working for you through all of life's changes, continually updating you and providing ongoing support. We stay abreast of what's ahead, helping you remain equipped for the challenges of tomorrow.

Our Approach – Businesses & Institutions

A powerful process to surpass your expectations

Highly customized in its implementation, our institutional plan management is unapologetically disciplined in the actions we take. We know your unique needs and responsibilities require that and much more, so our process relies on strategy, in-depth research, reporting and oversight to ensure we've covered the big picture as well as the finer details. Our goal? The ideal outcome for your organization's financial obligations. One that supports your work and all you strive to accomplish financially.

Evaluate

Dedicated to the distinct requirements of your organization, we must first gain a clear understanding of your overarching objectives down to each nuanced need. At the highest level, this includes discussing your fiduciary responsibilities and listening closely to uncover the purpose of the plan along with providing a thorough review of your current investment policy and a comprehensive risk analysis.

Construct

With a strong foundation of intelligent research at the core of every decision, we thoughtfully select asset classes and tailor an asset allocation to your organization's goals. Driving this investment selection is complete alignment with your investment policy, an awareness of active versus passive investing needs, and respect for other key considerations, such as your spending policy.

Employ

Building on your custom portfolio with extraordinary craftsmanship, we take an all-encompassing approach to each decision we make. Of course, this entails key areas including plan design, governance and investments. Most important, we undertake in-depth documentation at each step and stage of the process to help ensure every decision is accounted for in detail.

Manage

As meticulous as we are with every element of designing your plan, we become even more interested in providing the ongoing management you require once your plan is implemented. We not only monitor your investment plan and adjust as necessary, but provide performance reporting, research and due diligence, as well as prudent education for fiduciaries. That's what it takes to truly contribute to your organization's financial affairs.

What Makes Us Different – *do not include*

Team Recognitions – *do not include*

In the Community – *do not include*

Quote – *do not include*

DEFAULT COPY GUIDE

Niche Site Map

Home Page

If only Individual clients chosen:

Sophisticated wealth management to serve your individual needs

The complexities of the financial world require sophisticated wealth management and a partner to assist you who is as dedicated to pursuing your specific goals as you are. When it comes to managing your wealth, our team can help guide you through today's challenging financial landscape with professional skill and can do so with comprehensive plans that align with your specific investment requirements. Our client-focused approach makes the difference between chasing returns versus a personalized wealth management experience tailored to you.

If only Institutional clients chosen:

Effective strategies for powerful businesses and institutions

An organization as selective as yours requires a wealth advisory firm matched in stature. One that understands success means thoughtful accountability for each decision you make. When working with a financial partner to manage your capital, only the most responsible and objective guide will do. Beyond our global resources and unfettered access to sophisticated strategies is a trusted team who can help propel your business forward. We provide expertise and dedication to your needs so you can continue doing great things with your mission in mind.

If both client types chosen:

Next-level strategies to match any need

Our experienced team understands the stewardship required to prudently invest significant assets. As your partner, we craft solutions using our expertise and prudent management approach. For years we've offered individuals and institutions alike a higher degree of strategic thinking designed to discover new opportunities and help you achieve success. Our robust capabilities cover all aspects of investment management, from investment research to strategy and oversight. Everything you need to raise the bar when it comes to your financial affairs.

Our Approach

Expertise for the big picture and finer details

Our experienced team serves a variety of clients, playing an important role in your inner circle. Whether we are providing professional investment consulting or complete financial planning, you can rely on us to take care of the big picture and the finer details with an approach that is as disciplined as it is strategic. It all starts with developing a deep understanding of your needs. From there we aim to offer personalized attention, the highest level of service with integrity, and the advocacy needed on your side of the table. Our rigorous process ensures a comprehensive plan.

Assess

As we listen to you, we learn about your objectives, your perspective on risk and your liquidity needs. We then devise a plan to support your personal goals through professional investment management and strategic planning.

Create

Using the details you have confided in us and our access to high-caliber research and analysis, we narrow down a selection of investments and an allocation tailored to your financial life. We will then present our recommendations and outline the steps needed to implement your plan.

Implement

Once you have approved the plan, we put it into action by choosing investment vehicle types and services uniquely suited to your needs, goals and risk tolerance. We craft your portfolio carefully, making the most of the choices available to serve your precise situation.

Manage

After establishing your plan, we continue to monitor its progress toward your objectives and ensure it keeps working for you through all of life's changes, continually updating you and providing ongoing support. We stay abreast of what's ahead, helping you remain equipped for the challenges of tomorrow.

What Makes Us Different – *do not include*

Team Recognitions – *do not include*

In the Community – *do not include*

Quote – *do not include*

AB Contacts List

Monday, September 12, 2016 4:41 PM

Subject	FW: AB Contact List
From	Dominic Cador
To	Beth Burchfield; Jessica Custer; Aaron Weiss; Renaye Phillips; Whitney Bell - Skybridge; James Hood - Veredus; Anthony Arceri; Jeffrey Zimmerman; Olivier Bizimungu
Cc	Jennifer Carpenter; Maggie Kokemuller; Don Rua; Lisa Turley
Sent	Friday, September 02, 2016 10:25 PM
Attachments	 Combined AB List_FL...

This may be redundant or superfluous to some, but as conversion kicks off it may be challenging tracking down info on advisors right away. I have Ctrl+F searched this great document Jen forwarded along dozens of times in the past week to find out AB individual's city/branch, phone number, position/title, and email addresses. Hopefully this can be helpful to you as we are transitioning to a more integrated method to quickly learn about who we are/will be interacting with.

Thanks Jen for sharing this last week!

DOMINIC CADOR
Senior Product Analyst

Raymond James Marketing
T 727.567.5648 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

RAYMOND JAMES

From: Jennifer Carpenter
Sent: Saturday, August 27, 2016 1:09 PM
To: Dominic Cador <Dominic.Cador@RaymondJames.com>
Subject: AB Contact List

Fingers crossed this is the final list ☺

JENNIFER CARPENTER
Manager, Advisor Products

Raymond James Marketing
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880 Carillon Parkway, St. Petersburg, FL 33716

RAYMOND JAMES

AB Site Creation Checklist

Friday, June 10, 2016 12:39 PM

1. Receive email from content team that site is ready to build
2. Locate the site folder in: [\\rjfs3\marketing server sys\INITIATIVES\Alex. Brown\Client Advisor Marketing Support\Website Build](#)
3. Confirm you have the materials you need to build:
 - a. Site build form (word doc)
 - b. Any bio copy (word doc)
 - c. Any bio headshots
4. Create a ticket on the AB Site Build board in Trello
 - a. Login: trello.com
 - b. Username: webadmin
 - c. Pass: websites
 - d. Email: whitney.bell@raymondjames.com
 - e. **For any new members, create a Trello account and you will be added to the Alex Brown team and the board will be shared with you by the admin (currently Whitney)
5. Start site build in SC8
6. Once you start a site build, move the corresponding Trello card to the WIP (work in progress) lane
7. Once site is built, move the corresponding Trello card to the Review/QC column
8. Once site has been QC'd, move the corresponding Trello card to the Compliance lane
9. Once compliance approves the site and it is ready to publish, move the corresponding Trello card to the Ready to Publish lane
10. Once site is published, move the corresponding Trello card to the Live/Completed lane (perform any post-prod steps prior to moving card to this lane)

AB Web Build Form

Friday, June 10, 2016 12:33 PM

URL: ronantipa

Site Map: Silo

Site Layout: 7

Site Color: Burgundy

Image Theme: City (San Francisco)

Client Groups

Individuals

- ☒ Families and Individuals
- ☒ Business Owners / Entrepreneurs
- ☒ Corporate Executives
- ☒ Sudden Wealth
- ☒ Women
- ☒ Family Offices
- ☒ Healthcare Professionals
- ☐ Retirees

Businesses & Institutions

- ☒ Corporations
- ☐ Endowments / Foundations
- ☒ Corporate Retirement Plans
- ☒ Non-Profits
- ☒ Money Managers
- ☒ Venture Capital

Services

Individuals

- ☒ Banking & Lending
- ☒ Investment Solutions
- ☒ Estate Planning, Charitable Giving & Trust Services
- ☐ Retirement Planning
- ☐ Longevity Planning
- ☒ Risk Management
- ☐ Education Planning
- ☒ Portfolio Management
- ☐ Financial Planning
- ☒ Alternative Investments
- ☒ Sustainable Investing
- ☒ Key Client Partners
- ☒ Selling Your Business

Businesses & Institutions

- ☒ Investment Banking
- ☒ Corporate Retirement Plan Consulting
- ☒ Key Client Partners
- ☐ Institutional Consulting

- ☒Institutional Equity Sales
- ☐Institutional Fixed Income Sales
- ☐Business Planning
- ☒Monetization Services
- ☐Prime Brokerage & Custody Services

CUSTOM WEB COPY – NO CUSTOM CONTENT – See ‘default guide’
Our Approach

What Makes Us Different

Team Recognitions

In the Community

Quote

AB Sites Build Process

Tuesday, October 04, 2016 4:50 PM

1. Get web form from AM or Web services team
 - a. Confirm all details, work with person to ensure correct information is selected
2. Put site in Trello with appropriate labels, name the card the name of the site
3. Build site (move trello card through each step required)
4. Set up Billing information
 - a. Support Package: Silver
 - b. Bill To: FA Blotter
 - c. Purchase Date: Current Date +1 month (for now)
5. Create Google Analytics property for site
 - a. Currently AB sites get a special built script, James Hood is storing these in his staff folder in the SC8 Scripts folder follow previous sites examples, all scripts should be stored here for archival purposes
 - b. Load scripts into site using JS overrides within the content editor for THAT SPECIFIC SITE
6. Confirm with AM or Web services person you are working with that the correct options have been selected
 - a. Typically there wont be a preview phase, depends on the person.
 - b. Limit revisions, do not spend days and days working on revisions
7. Submit to compliance for approval (email Lindsay Evans to alert them, they should be monitoring the queue daily)
8. Once approved, publish site

Bio Photos

Monday, July 11, 2016 3:25 PM

Subject	RE: Photos available for AB Web Build
From	Whitney Bell - Skybridge
To	Hannah Fazio
Cc	Jennifer Carpenter; Dominic Cador; James Hood - Veredus
Sent	Monday, July 11, 2016 3:46 PM

Hi Hannah,

James and I have some feedback for you. We were noticing the naming conventions in the folders are like Image (2), Image (3), etc., which is leading to some confusion during uploading these to the system.

We want to be sure the photo adding process is streamlined and as error-proof as possible. Because of that concern, we were hoping you'd be able to go back into the folders (and going forward as well) for the sites that now have photos, and re-name the images according to the below naming conventions?

Headshots (*since there are two crop styles*) >

1. Crop 530x690 aspect 72 dpi > **personsname_lowres_bodyshot**
2. Crop 530x690 aspect 300 dpi > **personsname_highres_bodyshot**
3. Crop 270x350 aspect 72 dpi > **personsname_lowres_headshot**
4. Crop 270x350 aspect 300 dpi > **personsname_highres_headshot**

Team Shots

1. Crop 390x986 aspect 72 dpi > **lowres_teamshot**
 2. Crop 390x986 aspect 300 dpi > **highres_teamshot**
- ***For original/full-sized photos, no need to change the name.

Thank you!

From: Hannah Fazio

Sent: Monday, July 11, 2016 12:24 PM

To: Whitney Bell - Skybridge <Whitney.Bell@RaymondJames.com>; James Hood - Veredus <James.Hood@RaymondJames.com>

Cc: Jennifer Carpenter <Jennifer.Carpenter@RaymondJames.com>; Dominic Cador <Dominic.Cador@RaymondJames.com>

Subject: RE: Photos available for AB Web Build

Boston images are now available as well.

From: Hannah Fazio

Sent: Monday, July 11, 2016 8:45 AM

To: Whitney Bell - Skybridge <Whitney.Bell@RaymondJames.com>; James Hood - Veredus <James.Hood@RaymondJames.com>

Cc: Jennifer Carpenter <Jennifer.Carpenter@RaymondJames.com>; Dominic Cador <Dominic.Cador@RaymondJames.com>

Subject: Photos available for AB Web Build

Good morning! I wanted to let you know that the images for Atlanta, San Francisco and Philadelphia teams and advisors are available for the web build. I will also have Boston's wrapped up this morning. They are saved in the appropriate advisor or team folder in a "Photos" sub-folder. There are group photos in the variety of crops and DPIs as well as head-shots – shown below. Please note that there are some headshots of the team's SAs which may not have a bio on the site and therefore may not be used on the site.

Headshots

- 1) Crop 530x690 aspect 72 dpi
- 2) Crop 530x690 aspect 300 dpi
- 3) Crop 270x350 aspect 72 dpi
- 4) Crop 270x350 aspect 300 dpi

Team Shots

- 1) Crop 390x986 aspect 72 dpi
- 2) Crop 390x986 aspect 300 dpi

Please let me know if you have questions or concerns, or if this can be organized in a better way for you.

Thanks!

Hannah

HANNAH FAZIO
Product Manager

Raymond James Marketing
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880 Carillon Parkway, St. Petersburg, FL 33716

RAYMOND JAMES

New Photos DC/Baltimore

Monday, August 22, 2016 10:00 AM

<input checked="" type="checkbox"/> garberwealthmanagementgroup
hkwgroup
johnkelly
markradovanovich
perrymtrimble
rennergrouop

Cities w/Bio Photos

Tuesday, July 12, 2016 8:27 AM

7/12/2016

1. Atlanta
2. San Francisco
3. Philadelphia
4. Boston

<input checked="" type="checkbox"/> anthonyhan
<input checked="" type="checkbox"/> bartlettcarrier
<input checked="" type="checkbox"/> boszhardtnodagroup
<input checked="" type="checkbox"/> bradykern
<input checked="" type="checkbox"/> davidholmes
<input checked="" type="checkbox"/> douglassimon
<input checked="" type="checkbox"/> geraldlowe
<input checked="" type="checkbox"/> hulett-donarumsmithgroup
<input checked="" type="checkbox"/> jaymurphy
<input checked="" type="checkbox"/> kaplanboris
<input checked="" type="checkbox"/> kenneysyracuse
<input checked="" type="checkbox"/> lanesloangregg
<input checked="" type="checkbox"/> nancyciampi
<input checked="" type="checkbox"/> philippiryangroup
<input checked="" type="checkbox"/> ronantipa
<input checked="" type="checkbox"/> sheehandonabediangroup
<input checked="" type="checkbox"/> staffordschauergruop
<input checked="" type="checkbox"/> williamfurber
<input type="checkbox"/> Younggroup - no current images, will add post-prod

As of 7/19/16 we now have:

1. Winston-Salem
2. Chicago

<input checked="" type="checkbox"/> sheffieldthomasbinggroup
<input checked="" type="checkbox"/> danielboszhardt
<input checked="" type="checkbox"/> bryanspryzaksteam
<input checked="" type="checkbox"/> gallowaywillischandlergroup
<input type="checkbox"/> Keliacoffey - cropping needed
<input checked="" type="checkbox"/> comergroup
<input checked="" type="checkbox"/> corpeninggroup
<input checked="" type="checkbox"/> davisgroup
<input checked="" type="checkbox"/> johnhollan

<input checked="" type="checkbox"/>	robertquick
<input checked="" type="checkbox"/>	spanglergroup

As of 7/21/16 we now have:

1. New York Wall
2. New York Park
3. Greenwich
4. Houston
5. LA

<input checked="" type="checkbox"/>	matthewmadlinger	New York (345 Park)
<input checked="" type="checkbox"/>	maiernealgroup	New York (345 Park)
<input type="checkbox"/>	micklichgroup	Los Angeles - no photos
<input checked="" type="checkbox"/>	markpond	Houston
<input type="checkbox"/>	davidrosenthal	Greenwich - no photos
<input checked="" type="checkbox"/>	toddrubsamen	New York (60 Wall)
<input checked="" type="checkbox"/>	shankersadhwani	New York (345 Park)
<input type="checkbox"/>	micahscheinberg	Los Angeles - no photos
<input checked="" type="checkbox"/>	elisabethschreiber	Los Angeles
<input checked="" type="checkbox"/>	stepaniangroup	Greenwich
<input checked="" type="checkbox"/>	winfordgroup	Houston
<input checked="" type="checkbox"/>	jaredzuflacht	New York (345 Park)

FINAL Bio Photos

Monday, August 01, 2016 5:22 PM

New York (Wall Street)

- Todd Rubsamen - ~~toddrubsamen~~
- David Bruhowzki - (no site folder, was part of 'NO SURVEY RESPONSE' group)
- Team Nolan_Ryan - *No website name indicated*
- Kevin Laurie - *No website name indicated*
- Team Pan_Lord - *No website name indicated*

New York (Park Ave)

- Team _Grill_Grous_Christon_Hirschberg – ~~GGHC~~
- Team David_Boiarsky - ~~davidboiarsky~~
- Adam Frankfort - ~~adamfrankfort~~
- Team Fishel_Ruane - ~~fishelruane~~
- David Hogan - ~~davidhogan~~
- Matthew Madlinger - ~~matthewmadlinger~~
- Shanker Sadhwani - ~~shankersadhwani~~
- Bradley La Conte - ~~bradleylaconte~~
- Jared Zuffacht - ~~jz~~
- Chris Guttilla - (no site folder, was part of 'NO SURVEY RESPONSE' group)
- Nicholas Mennona - (no site folder, was part of 'NO SURVEY RESPONSE' group)
- Richard Parker - *No website name indicated*
- Team Michael_Fiore - *No website name indicated*
- Robert Traenkle - *No website name indicated*
- David Melian - *No website name indicated*
- Team_Leyton, Shillingford - *No website name indicated*

Houston

- Scott Ashmore – ~~scottashmore~~
- Samuel David Frankfort - ~~samuelfrankfort~~
- Frank Winford - ~~winfordgroup~~
- James Landers - ~~jameslanders~~
- Mark Pond – ~~markpond~~
- Stephan Farber - *No website name indicated*
- John Heck - *No website name indicated*
- Daniel Austin - *No website name indicated*

Subject	RE: Headshot images
From	Hannah Fazio
To	Whitney Bell - Skybridge; James Hood - Veredus
Cc	Jennifer Carpenter
Sent	Monday, August 01, 2016 5:09 PM

Hi,

Below are the individuals and team websites that now have updated photos, saved in the photo sub-folder "FINAL".

Please let me know if there are any questions.

Thank you!
Hannah

New York (Wall Street)

- Todd Rubsamen - ~~toddrubsamen~~
- David Bruhowzki - (no site folder, was part of 'NO SURVEY RESPONSE' group)
- Team Nolan_Ryan - *No website name indicated*
- Kevin Laurie - *No website name indicated*
- Team Pan_Lord - *No website name indicated*

New York (Park Ave)

- Team _Grill_Grous_Christon_Hirschberg – ~~GGHC~~
- Team David_Boiarsky - ~~davidboiarsky~~
- Adam Frankfort - ~~adamfrankfort~~
- Team Fishel_Ruane - ~~fishelruane~~
- David Hogan - ~~davidhogan~~
- Matthew Madlinger - ~~matthewmadlinger~~
- Shanker Sadhwani - ~~shankersadhwani~~
- Bradley La Conte - ~~bradleylaconte~~
- Jared Zuffacht - ~~jz~~
- Chris Guttilla - (no site folder, was part of 'NO SURVEY RESPONSE' group)
- Nicholas Mennona - (no site folder, was part of 'NO SURVEY RESPONSE' group)
- Richard Parker - *No website name indicated*
- Team Michael_Fiore - *No website name indicated*
- Robert Traenkle - *No website name indicated*
- David Melian - *No website name indicated*
- Team_Leyton, Shillingford - *No website name indicated*

Houston

- Scott Ashmore – ~~scottashmore~~
- Samuel David Frankfort - ~~samuelfrankfort~~
- Frank Winford - ~~winfordgroup~~
- James Landers - ~~jameslanders~~
- Mark Pond – ~~markpond~~
- Stephan Farber - *No website name indicated*
- John Heck - *No website name indicated*
- Daniel Austin - *No website name indicated*

From: Hannah Fazio
Sent: Wednesday, July 27, 2016 9:47 AM
To: Whitney Bell - Skybridge <Whitney.Bell@RaymondJames.com>; James Hood - Veredus <James.Hood@RaymondJames.com>
Subject: RE: Headshot images

Yes, absolutely. We will do that.

Thank you!

New York (Wall Street)

- ~~Todd Rubsamen~~ - ~~toddrubsamen~~
- David Bruhowzki - (no site folder, was part of 'NO SURVEY RESPONSE' group)
- Team Nolan_Ryan - *No website name indicated*
- Kevin Laurie - *No website name indicated*
- Team Pan_Lord - *No website name indicated*

New York (Park Ave)

- Team _Grill_Grous_Christon_Hirschberg – ~~GGHC~~
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- Team Fishel_Ruane - ~~fishelruane~~
- David Hogan - ~~davidhogan~~
- Matthew Madlinger - ~~matthewmadlinger~~
- Shanker Sadhwani - ~~shankersadhwani~~
- Bradley La Conte - ~~bradleylaconte~~
- Jared Zuffacht - ~~jz~~
- Chris Guttilla - (no site folder, was part of 'NO SURVEY RESPONSE' group)
- Nicholas Mennona - (no site folder, was part of 'NO SURVEY RESPONSE' group)
- Richard Parker - *No website name indicated*
- Team Michael_Fiore - *No website name indicated*
- Robert Traenkle - *No website name indicated*
- David Melian - *No website name indicated*
- Team_Leyton, Shillingford - *No website name indicated*

Houston

- ~~Scott Ashmore~~ – ~~scottashmore~~
- Samuel David Frankfort - ~~samuelfrankfort~~
- Frank Winford - ~~winfordgroup~~
- James Landers - ~~jameslanders~~
- Mark Pond – ~~markpond~~
- Stephan Farber - *No website name indicated*
- John Heck - *No website name indicated*
- Daniel Austin - *No website name indicated*

Strikethrough indicates pictures have been updated

From: Whitney Bell - Skybridge
Sent: Wednesday, July 27, 2016 9:45 AM
To: James Hood - Veredus <James.Hood@RaymondJames.com>; Hannah Fazio <Hannah.Fazio@RaymondJames.com>
Subject: RE: Headshot images

I was thinking since you'll have to go into the site's files anyway, would you mind creating a new folder in each for these images, "Final," and provide us with a list of the site names that we should update? Then we will know which images since they'll be in separate folders. Will that work for you?

From: James Hood - Veredus
Sent: Wednesday, July 27, 2016 9:38 AM
To: Hannah Fazio <Hannah.Fazio@RaymondJames.com>; Whitney Bell - Skybridge <Whitney.Bell@RaymondJames.com>
Subject: RE: Headshot images

I would say update the pictures, and give us a list of exactly which advisor groups are getting the updated images, Whitney may have a better solution

JAMES HOOD
Web Administrator

Raymond James Marketing
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From: Hannah Fazio
Sent: Wednesday, July 27, 2016 9:37 AM
To: James Hood - Veredus <James.Hood@RaymondJames.com>; Whitney Bell - Skybridge <Whitney.Bell@RaymondJames.com>
Subject: RE: Headshot images

Only specific ones – same images of the same people, just now they are the retouched photos, and in Houston's case, the correct background.

From: James Hood - Veredus
Sent: Wednesday, July 27, 2016 9:36 AM
To: Hannah Fazio <Hannah.Fazio@RaymondJames.com>; Whitney Bell - Skybridge <Whitney.Bell@RaymondJames.com>
Subject: RE: Headshot images

Are these for all advisors from those locations, or only specific ones?

JAMES HOOD
Web Administrator

Raymond James Marketing
T 727.567.5423 // F 866.597.3988
880 Canillon Parkway, St. Petersburg, FL 33716

From: Hannah Fazio
Sent: Wednesday, July 27, 2016 9:21 AM
To: Whitney Bell - Skybridge <Whitney.Bell@RaymondJames.com>; James Hood - Veredus <James.Hood@RaymondJames.com>
Subject: Headshot images

Hello!

So we had put in the photos for Greenwich, the two NY locations and Houston that were not officially retouched. Now the actual final photos are coming in. We can begin replacing the old images with the new, correct images in the appropriate folders. What is the best way to indicate this to you?

Thank you!
Hannah




HANNAH FAZIO
Product Manager

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RAYMOND JAMES

Brief AB 9.6 Go-Live FAQ Guide

Tuesday, September 06, 2016 9:25 AM

Subject	Brief AB 9.6 Go-Live FAQ Guide
From	Dominic Cador
To	Jessica Custer; Aaron Weiss; Renaye Phillips; Melissa Campbell
Cc	Whitney Bell - Skybridge; James Hood - Veredus; Don Rua; Olivier Bizimungu; Anthony Arceri; Lisa Turley; Jennifer Carpenter; Jeffrey Zimmerman
Sent	Tuesday, September 06, 2016 8:59 AM
Attachment s	<div> AB 9.6 Website ...</div> <div> 12 Combinat...</div> <div> AB Final Website ...</div>

Hi team,

Please see the attached FAQ guide, the list of 12 site combinations and the overall list of sites published this morning. This information should help keep us together right out the gate and we can see what kind of questions are coming through and develop a more refined, long-term version accordingly.

Thanks!

DOMINIC CADOR
Senior Product Analyst

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880 Carillon Parkway, St. Petersburg, FL 33716

RAYMOND JAMES

Concepts | Form | Survey

Thursday, June 02, 2016 3:24 PM

http://raymondjames.qualtrics.com/jfe6/form/SV_cOcyCXGMPMHGDvT - Survey

https://raymondjames.qualtrics.com/CP/File.php?F=F_3m8Yskpe3ynUkAZ – PDF

http://public1xa.rjf.com/Corp_Sites/b_RaymondJamesweb/dev/debra/AlexBrown/3/1.htm - concept 6

http://public1xa.rjf.com/Corp_Sites/b_RaymondJamesweb/dev/debra/AlexBrown/1/1.htm - concept 7

CONTENT NAVIGATION

Monday, June 27, 2016 10:45 AM

Homepage Intro

Monday, June 27, 2016 10:58 AM

DEFAULT CONTENT:

Data

Banner Heading:

Home_An elevated advisory experience

Banner Content:

Home_An elevated advisory experience

COPY BANNER HEADER

SERVING YOU. WELL. AN ELEVATED ADVISORY EXPERIENCE

Broken Banner Image

OTHER OPTIONS:

Data

Banner Heading:

Home_Effective strategies for powerful businesses and institutions

Banner Content:

Home_Effective strategies for powerful businesses and institutions

COPY BANNER HEADER

EFFECTIVE STRATEGIES FOR POWERFUL BUSINESSES AND INSTITUTIONS

Broken Banner Image

Data

Banner Heading:

Home_Next-level strategies to match any need

Banner Content:

Home_Next-level strategies to match any need

COPY BANNER HEADER

NEXT-LEVEL STRATEGIES TO MATCH ANY NEED

Custom Banner Image

Data

Banner Heading:

Home_Serving you-Well

Banner Content:

Home_Serving you-Well

COPY BANNER HEADER

SERVING YOU. WELL. BETTER

Custom Banner Image

Data

Banner Heading:

Home_Sophisticated wealth management to serve your individual needs

Banner Content:

Home_Sophisticated wealth management to serve your individual needs

COPY BANNER HEADER

SOPHISTICATED WEALTH MANAGEMENT TO
SERVE YOUR INDIVIDUAL NEEDS

Custom Banner Image

What Makes Us Different

Monday, June 27, 2016 10:45 AM

Data

Banner Heading:
What Makes Us Different_Blended 1

Banner Content:
Difference_Thoughtful service and tailored strategies with your needs at the center

COPY BANNER HEADER

A WIDE-RANGE OF CAPABILITIES, TO FULFILL YOUR
DIVERSE FINANCIAL NEEDS

Data

Banner Heading:
What Makes Us Different_Blended 2

Banner Content:
Difference_Thoughtful service and tailored strategies with your needs at the center

COPY BANNER HEADER

A COLLECTIVE OF EXPERTISE, DEDICATED TO YOUR
FINANCIAL SUCCESS

Data

Banner Heading:
What Makes Us Different_Individual 1

Banner Content:
Difference_Thoughtful service and tailored strategies with your needs at the center

DISCIPLINED SERVICE, BACKED BY EXPERTISE

Data

Banner Heading:

What Makes Us Different_Individual 2

Banner Content:

Difference_Thoughtful service and tailored strategies with your needs at the center

COPY BANNER HEADER

THOUGHTFUL SERVICE AND TAILORED STRATEGIES, WITH
YOUR NEEDS AT THE CENTER

Data

Banner Heading:

What Makes Us Different_Institutional 1

Banner Content:

Difference_Thoughtful service and tailored strategies with your needs at the center

Banner Image:

COPY BANNER HEADER

A COLLECTIVE OF EXPERTISE, DEDICATED TO YOUR
FINANCIAL SUCCESS

Data

Banner Heading:

What Makes Us Different_Institutional 2

Banner Content:

Difference_Thoughtful service and tailored strategies with your needs at the center



EXPANSIVE RESOURCES WITH TAILORED SERVICE

Initial Alex. Brown Site Creation

Thursday, July 14, 2016 10:07 AM

Jen Final QC

Tuesday, August 30, 2016 12:51 PM

Subject	FW: AB Site QC - Jen's list
From	James Hood - Veredus
To	Whitney Bell - Skybridge
Sent	Tuesday, August 30, 2016 12:47 PM
Attachments	 8 27 QC List  JenniferCar penter QC...

Here was Jennifers QC list, I covered all of the items on it, and updated here on which ones we couldn't change. My responses were saved in a separate file (in case she were still working on the other). The file, JenniferCarpenter QC list has all of my notes in it. My follow up email to this was:

I have made notes on your QC list as to what has been done, and what we cannot do. There are a few things we do not control ourselves, that would have to be done at the HI level

Resource selection tags: we do not currently have this ability

Two titles on About Us Bio Tile: we do not control what data appears here, only which advisors

Map and directions: we do not control how this link opens, only that it does appear

Contact form: this should be handled at HI's level.

Media Carousel: This should be handled at HI's level

Now, there are CSS (stylesheet) fixes that we could apply, but these would have to be done at the site level (each stylesheet would have to be verified as working properly with no additional problems)

JAMES HOOD
Web Administrator

Raymond James Marketing
T 727.567.5423 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

From: Jennifer Carpenter

Sent: Monday, August 29, 2016 8:47 AM

To: James Hood - Veredus <James.Hood@RaymondJames.com>

Cc: Dominic Cador <Dominic.Cador@RaymondJames.com>

Subject: AB Site QC - Jen's list

Hi!

I've attached comments for the websites I was responsible for reviewing in this QC stage. I reviewed these for content inclusion and reasonableness of the custom content more than anything else.

I'll review the generic site examples for functionality later this afternoon. ☺

A couple of general comments:

It seems like the order of the 'About Us' section are inconsistent. I think About AB should be anchored at the bottom

Suggest that team reviews resource selection tags

Suggest adding both titles to 'About Us' landing page

Make sure 'Map & Directions' link opens in a new tab

Contact form is too light

Media Carousel in Theme 6 is too light

Garber is pretty needy. If you let me know when their site updates have been made, I'll create PDFs and send over to them. ☺

If you have any questions on the comments, please let me know.

Thanks!

JENNIFER CARPENTER
Manager, Advisor Products

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RAYMOND JAMES

Phase 2 & 3 Builds

Tuesday, July 12, 2016 7:56 AM

PHASE 2 - For all sites:

- Switching theme 6 to 7 where applicable
- Bio content/pages and photos
- Add all team members and site owner (CA's only)

PHASE 3

- Billing info - silver package, bill to FA, start date 9/6/16
- Site Map re-do > Deleting client groups/niche and service selections pages, re-adding full set, then removing non-selected pages
- Add resources page - confirm addition
- Add resource rotator/carousel for homepage
- Verifying image themes look good against the content, and were applied per site settings/image theme selection
- Theme 7 switchover, verify components transferred to homepage
 - 8/2/16 - Currently missing the related resources
 - Resources page not fully developed, link to instance of an object that does not exist (assuming missing components and page link)
 - *For these sites, verify that homepage component selections actually transfer, i.e. niche tile selections, global tiles, global quotes and team tile*
- Bio pages:
 - Spacing on bio pages where content was locked, see phase 3 swim lane with blue label for "bio page issue"
 - Six sites left in phase 2, need bio pages for CA's with page load error
- Look into those who selected theme 6/layout b but have chosen silos for clientele homepage module/niche tiles, when adding only two the parent col spacing should be col-xs-12 but it currently stacks on top of each other and we cannot override that (make each tile col-xs-6) - add green label and customize niches

Image Theme Font Issues

Wednesday, August 03, 2016 10:02 AM

Theme Name	Page	Component	Sub-Component
Interpersonal	Home	Category Tile	Sliders 1-2
Financial	Home	Category Tile	Sliders 1,3 (garberwealthmanagementgroup)

Final Week Work

Tuesday, August 30, 2016 10:51 AM

POSSIBLE PHASE 4/FINAL REVIEW

- Homepage - team tile has hover on headline, set link to page: 'about us'
- May need to go back and select their specific options for the resource page
- Related resources component was added to the client groups pages – need global update on content for that - currently empty
- Bio tile images - verify resizing to 270 x 350 is occurring and that the related pics on the bio pages are still full size 530 x 690, also verify person position in photo is center.
 - Theme 7 looks to be using the 270 x 350 and also using same size on person page, do we need to swap the sources for sites on theme 7?
- Quote on bio pages? What to use there?
- Niche tile link set?
- Make sure blue theme is actually blue, not burgundy

Review with James:

- Bio tile auto deleted from the silo sitemap, possibly due to update on that component
 - James re-added component to silo site maps
 - GA properties added for all sites except 2 that are locked by compliance:
 - Boriskaplan, and gregoryclark
 - James not able to delete random items, even local copies of items, RE: site pages changed by Nikki
 - Still pending image theme updates
 - Manually added titles and designations to people items
 - Manually added phone numbers to the footer address
 - Maps and directions check box done
 - Updated maps and directions page, component not removed, only the data sources (in the instance the global updates are made - coming RE: Nikki)
 - Lisa sent QC doc link to location on server
 - Addition of KCP page, standing by
 - Theme 7 niche tile gradient, 2nd to last one has gradient issue
 - Dom says fixed, verify
 - Theme 6 category tiles, need more than 1 - updates on sites with only 1 selected
 - Use services b/c it links to a page they all have
 - Ensure width goes across page
 - Unlock all items then push items through draft in workbook
- I saved a copy of the checklist with my comments [here](#) in case you want to see the trends I'm finding.
- Corporate Retirement Plan niche tile on Template 7 is too tall (cuts off learn more, probably solved by making the text 2 lines)
 - Images within the sites are not responsive, inline images at the very least should have the class "img-responsive" on them
 - Titles and designations on theme 6 about us pages are too light, can barely read
 - CFP Disclosure on Template 7 sites appears in the wrong location or overlaps in an odd way with previous/next bio buttons. Disclaimer should be above previous/next.

QC Checklist

Monday, July 11, 2016 10:31 AM

1. Verify Initial Build Information
 - Site Name/URL
 - Sitemap
 - Layout
2. Verify Theme
 - Verify correct color scheme was chosen
3. Verify Site Map Specific Elements selected properly
 - Verify Client Groups
 - Verify Services
 - Home Page Clientele Module (if selected)
 - Verify Our Approach Pages (included or removed)
 - Verify correct topics selected
 - What Makes Us Different Section (optional)
 - Team Recognition (optional)
 - In The Community (optional)
 - About Alex Brown (if above not included, this will be in the about us menu)
4. Verify Page Specific Information
 - Home Page
 - Team Photo (and team quote if included)
 - Home Page Quote
 - Differentiators
 - Verify correct selection (default diff tiles show global dummy data)
5. Resource Rotator (included or not)
 - Resources selected properly

Release Updates

Tuesday, August 30, 2016 12:50 PM

8.28.16 Updates

Tuesday, August 30, 2016 12:51 PM

Begin forwarded message:

From: Nikki Fulp <Nikki.Fulp@RaymondJames.com>

Date: August 26, 2016 at 10:57:36 PM EDT

To: Lisa Turley <Lisa.Turley@RaymondJames.com>, Dominic Cador <Dominic.Cador@RaymondJames.com>

Cc: Don Rua <Don.Rua@RaymondJames.com>, Brian Klakring <Brian.Klakring@RaymondJames.com>, Jennifer Carpenter <Jennifer.Carpenter@RaymondJames.com>, Olivier Bizimungu <Olivier.Bizimungu@RaymondJames.com>

Subject: 8.26 code release update

Code release is complete and everything is looking good. In preparation for your QC of sites, I have created new samples sites, have reviewed some advisor sites as well as global content in an effort to make sure you all are in decent shape and point out anything I believe the team should be sure to check for and/or update appropriately. You all can reference the following sample sites which are based on site maps, as needed: <https://scrcm01apwpd.rjf.com/ab-silos> and <https://scrcm01apwpd.rjf.com/ab-blended>.

- ☒ - **Data folders** – Make sure all data folders are present; Mirror AB-Blended content tree
- ☐ - **Category tiles** – Make sure tiles link to pages within the site; The links are automatically mapped so the team needs to make sure they have accounted for the site map selected in correspondence with the category tile(s) selected. *If you hover on the tile or 'Learn More' link and a URL doesn't appear in the bottom left hand corner, then there is most likely a mapping issue (no link because the page isn't available in the site).* I left an example of this on the AB-Blended site for you to reference, if needed. Click to expand the Portfolios That Reflect Ownership tile and hover over Learn More. This tile doesn't link out to a page.
 - Resources vital to success > goes to homepage, should go to resources page
 - Expertise knowledgeably applied > goes to homepage
 - Service attentive and personal > goes to about us page, should this be services page instead?
- ☐ - **Media carousel & related resources components** – Make sure these components have been added to every homepage and content page (niche and services).
- ☐ - **Map and Directions page** – Few things related to this page:
 - Sent an email to Jen to see if she wants to include an intro paragraph on this page or not. This update will need to be made on all sites.
 - Found a bug related to the way this page is set up. Based on Jen's response to the above, you'll either need the team to add a space where the intro is or copy that she provides. Then, following 9/11 release, you'll want to make sure the pages get updated to be set up correctly.
 - I have also asked Jen about the quote component that can be found on this page. Waiting to hear if she wants it included on this page or not. Her response will provide direction of update the team would need to make.
- ☐ - **Contact Us page** – Waiting for Jen's direction as to whether or not the quote component should be

on this page. By default, it is showing test content so an update will need to be made to all sites. Update needed will be based on her instruction.

- ☐ - **Footer Address labels** – Noticed that address labels haven't been updated on some sites. What gets pulled in, by default, is the entity short name. I'm assuming you all will want to update this to the appropriate city so it doesn't also display the branch number?
- ☐ - **Phone numbers** –
 - Branch numbers – HR / IT got the phone numbers into CSS this week and it looks like the system isn't syncing the data the way it should be. I've emailed the developers to look into this further but any fix won't be available until 9/11 release. In the meantime, I either suggest leaving phone numbers off, if you are able, or manually entering them within each site.
 - Direct lines for advisors / team members (displayed within bio tile and page) – This data was entered into CSS as office lines instead of direct lines so will not get updated appropriately. I suggest the team adds the team member's numbers to the person items, if you all want that displayed within the site.
- ☐ - **Bio list page (About Us)** – It looks like titles have been added to some folks but not others. May want to look at this to review the direction to take.

NIKKI FULP

Marketing Technology Analyst

Raymond James Marketing

T 727.567.5282 // F 866.597.3988

880 Carillon Parkway, St. Petersburg, FL 33716

RAYMOND JAMES

7.22.16 Updates

Friday, July 22, 2016 9:35 AM

Subject	FW: SC8 Bug Update
From	Dominic Cador
To	Whitney Bell - Skybridge; James Hood - Veredus
Sent	Thursday, July 21, 2016 10:23 AM

Just an FYI.

From: Nikki Fulp
Sent: Wednesday, July 20, 2016 10:05 PM
To: Dominic Cador; Brian Klakring
Cc: Jennifer Carpenter; Lisa Turley
Subject: RE: SC8 Bug Update

Dominic,

Functionally speaking, there are no bugs in the list that should be keeping the team from starting to work on the build out of sites planned for in phase II – especially assigning site owner/team members and adding content to bio pages.

From a content / page layout perspective, I know there was feedback from Jen's meeting with Cameron that we were waiting on. The site maps have been updated to reflect this feedback. I have recreated the sample sites for the site maps and have sent them to Jen to take another look at the sites created from those site maps.

We have submitted the request to release the code from last sprint to Production tomorrow evening. Some notes for the team re: items tomorrow's release will include:

- The development work for **resources** including: the resources (list) page and detail pages, the media carousel on the home page and related resources components on the niche and services pages. We will get these pages updated as quickly as possible so the team should be able to move forward with.
- **Theme 7** is not yet complete but, since we have started on development, the team will be able to go ahead and select Theme 7 in the wizard for the appropriate sites. The sites won't be 100% for a couple more weeks but this should at least help get a little bit ahead. *I have emailed Andy to make sure he doesn't see any concerns with going ahead and making this change.*
- **Billing** – I'll need to add the appropriate lookup items for billing but this development is complete so the team can select the monthly support package for each site. I believe they are not paying for a website set up fee but, if I am incorrect, please let me know so I can get that lookup added as well.
- **Preview** – Preview from Experience Editor bug is fixed
- **BrokerCheck bar** will be in place (no manual changes will be needed to implement this)
- **Logo file** displayed based on domain; Note: the incorrect logo file will be displayed for theme 7 sites as there is additional development being done to account for use of the regular/color logo vs. white logo.

With all of that being said, the team can start on tasks within Phase II at any time (and could have started on these tasks once we confirmed workaround for the bugs reported). As mentioned above, the team can also go ahead and change the layout of the appropriate sites to Theme 7 as well as the billing items.

I know you have had concerns about efficiencies and limiting the number of times the team would need to go back and touch sites. So, from an efficiencies standpoint, I would suggest holding off on switching out pages within the sites until the resource pages / components are added and Jen has given her final blessing on the other pages. That way, the team can knock out all of the content/layout changes at one time.

Please let me know if you have any additional questions. We'll be sure to keep you posted over the next couple days so you can continue to plan appropriately.

NIKKI FULP
Raymond James Marketing
T 727.567.5282

From: Dominic Cadore
Sent: Wednesday, July 20, 2016 5:49 PM
To: Brian Klakring
Cc: Nikki Fulp; Jennifer Carpenter; Lisa Turley
Subject: RE: SC8 Bug Update

We have not been able to start Phase II yet.

Each major step needs its own buffer zone even if we presume there should not be issues. There are still a few steps or areas of risk we have not experienced yet therefore cannot write off:

- Building thru Phase II
- Flipping sites to layout 7
- Compliance (sending to, approval, and sending back)
- Any after-the-fact website edits
- Publishing and archiving process

Best,

DOMINIC CADORE
Senior Product Analyst

Raymond James Marketing
T 727.567.5648 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

RAYMOND JAMES

From: Brian Klakring
Sent: Wednesday, July 20, 2016 5:02 PM
To: Dominic Cadore
Cc: Nikki Fulp; Jennifer Carpenter; Lisa Turley
Subject: Re: SC8 Bug Update

Why are we losing our buffer time?

Sent from my iPhone

On Jul 20, 2016, at 4:26 PM, Dominic Cadore <Dominic.Cadore@RaymondJames.com> wrote:

Nikki,

Please see the [updated bug tracking sheet](#) and let us know whether each item is being addressed

on Thursday's release, will be addressed in the next release, or will need to be addressed internally (i.e. by Jeremy) after the fact. Please also keep our team up-to-date if any bug fixes have been applied, they sometimes inadvertently discover items have been repaired while working on separate tasks.

Our schedule is losing most of its buffer time so it is important we stay afloat on the status of the changes, when items/bugs will be addressed, components of upcoming releases and any other pertinent/relevant updates even if it is not looking optimistic so we can best plan for the next few weeks.

Thank you, Nikki. I know there are several moving parts on your end, please let us know if there is anything we can do to help.

Best,

DOMINIC CADOR
Senior Product Analyst

Raymond James Marketing
T 727.567.5648 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

<image001.png>

Call Outs

Friday, September 02, 2016

11:22 AM

Video Area

Friday, September 02, 2016 11:51 AM

Currently there is a component for Videos, but it doesn't work correctly yet. The best way to include a video on a page for now is by embedding it into a rich text content block. Follow the directions for Rich Text Content Block, or "Freeform Content Block". You will have to apply inline styles to get it to look centered and exactly how it needs to be.

AB SITE PUBLISHING ISSUES

Thursday, September 01, 2016 4:07 PM

	Site Status	Site Name	Workflow Status	Published process by James/Whit?
1	Live	hulettsmithdonarumagroup	pending	yes
2	Live	philippiryangroup	pending	yes
3	Live	boriskaplan	pending	yes
4	Live	bartlettcarrier	pending	yes
5	Live	corpeninggroup	pending	yes
6	Live	Fishelurane - Melinda Fishel not showing up on bio tile. She is selected on the tile and I re-published but not seeing her Verified she is active in CSS. https://alex-brown.com/fishelruane/ab-out-us	pending	yes
7	Live	wallgroup	pending	yes
9	Live	comergroup	pending	yes
✓ 8	Live	bryanspryzaksteam	Pending Published	yes
✓ 10	Live	younggroup	Pending Published	yes
✓ 11	Staged	stepaniangroup	Pending Published	Yes - 'save and publish' did not save or publish - page static when button pressed
✓ 14	Live	mchughgroup	pending	yes
15	Staged	venturecapitalervicesgroup	pending	No - pending compliance approval, not yet sent

Re-Compliance Send

Thursday, September 15, 2016 12:03 PM

These sites are re-submitted to compliance b/c they had the same two numbers on them.

White = Whitney

Blue = James

https://alex-brown.com/davisgroup
https://alex-brown.com/elisabethschreiber
https://alex-brown.com/galbraithfinancialgroup
https://alex-brown.com/ggghc
https://alex-brown.com/hulettsmithdonarumagroup
https://alex-brown.com/craigcerone
https://alex-brown.com/hkwgroup
https://alex-brown.com/lanesloangregg
https://alex-brown.com/markpond
https://alex-brown.com/micahscheinberg
https://alex-brown.com/nancyciampi
https://alex-brown.com/perrymtrimble
https://alex-brown.com/ronantipa
https://alex-brown.com/scottashmore
https://alex-brown.com/sheehandonabediangroup
https://alex-brown.com/skivingtoncantgroup
https://alex-brown.com/staffordschauergroup
https://alex-brown.com/toddrubsamen
https://alex-brown.com/wallgroup
https://alex-brown.com/winfordgroup
https://alex-brown.com/megcomer
https://alex-brown.com/davidholmes
https://alex-brown.com/douglassimon
https://alex-brown.com/fishelruane
https://alex-brown.com/garberwealthmanagementteam
https://alex-brown.com/gonnellogroup
https://alex-brown.com/jamesknight
https://alex-brown.com/geraldlowe
https://alex-brown.com/jz
https://alex-brown.com/machargrove
https://alex-brown.com/matthewmadlinger
https://alex-brown.com/micklichgroup

https://alex-brown.com/paulfishman
https://alex-brown.com/philippiryangroup
https://alex-brown.com/robertquick
https://alex-brown.com/shankersadhwani
https://alex-brown.com/sheffieldthomasbinggroup
https://alex-brown.com/spanglergroup
https://alex-brown.com/stepaniangroup
https://alex-brown.com/treitmancohenayersgroup
https://alex-brown.com/williamfurber
https://alex-brown.com/younggroup

QA Audits

Monday, August 08, 2016 4:05 PM

QA Audit 8/22/16

Monday, August 22, 2016 12:40 PM

Image themes:

- All image themes have bad crops; homepage crop different from all other pages, as large banner component is used on that page, and small banner component used on the other pages

Homepage

- Category tiles not setting default "learn more" link source
- Team tile has a hover on header copy but no set url source

Interior Pages

- Related resources is not auto added into other pages, will this need to be done manually? There's a spot for related resources on all pages but not the actual component

Bio Pages

- Did not add titles, designations or phone numbers they should feed automatically

About Us Page

- Bio tile crop will be off if person not fully in center of photo (see Adam Frankfort) - workaround is to re-crop person to center of image

Category Tiles

-

Contact Page

- Remove "the code isn't going to lie to us" quote from page

Maps and Directions Page

- Still has lorem ipsum placeholder text
- Still has default banner with header "sophisticated wealth management displayed here"
- Still has Microsoft quote on page

Example Pages:

- Font-weight different in the services list on this page:
<https://scrcm01apwqa.rjf.com/whittestt6b/our-clients/corporations>
- This page had default image caption and font-weight light on accordion:
<https://scrcm01apwqa.rjf.com/whittestt6b/services/services/alternative-investments>

QA Audit 8/3/16

Wednesday, August 03, 2016 3:07 PM

Site: whittest theme7

A. *HOMEPAGE*

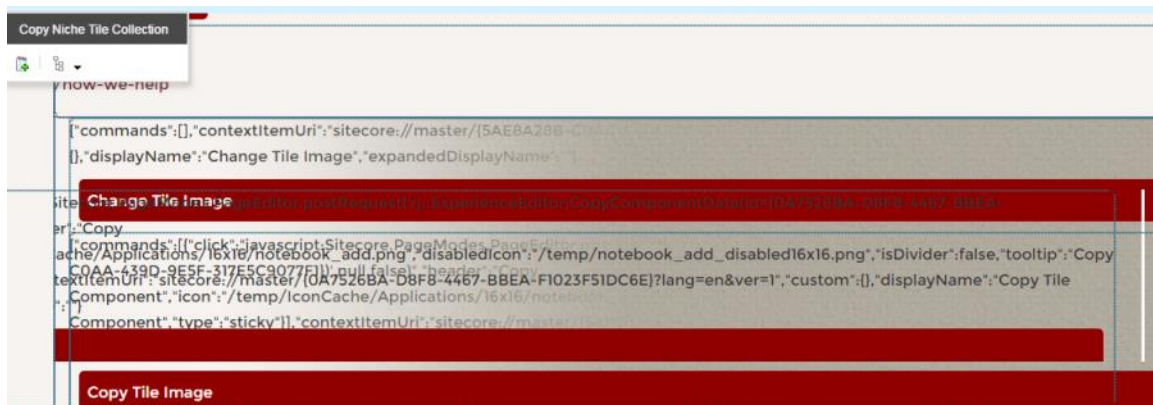
- Appearance of niche tiles is way off
- Image theme does not take effect, still uses placeholder image



- Text on global category tiles is too light/unreadable

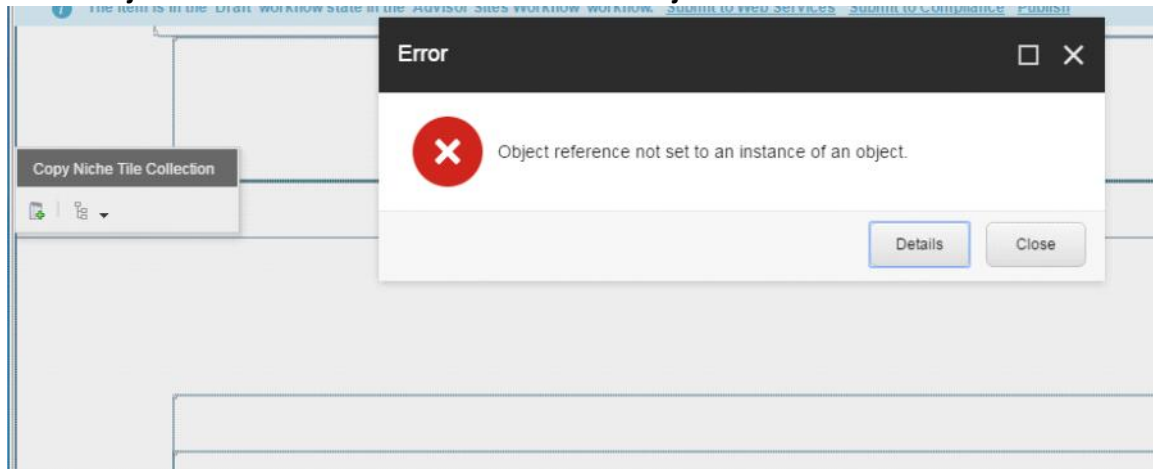


- Not able to copy the banner component and sub-components (to swap out for global OR for customization); error message: Object reference not set to instance of an object).
- Niche tile component looks messed up in preview:



- Not able to copy niche tile component (for making global selections)

- o "Object reference not set to an instance of an object."



- No disclosure in footer

B. BIO PAGE/COMPONENT

- No option on the page (in experience editor) to add bio copy or quote. Able to do so with content editor.

C. WHAT MAKES US DIFFERENT

- Not able to use my copy of the intro text content block (for those advisors who opted for custom content on this page). Using the content editor also does not save the changes on this page.

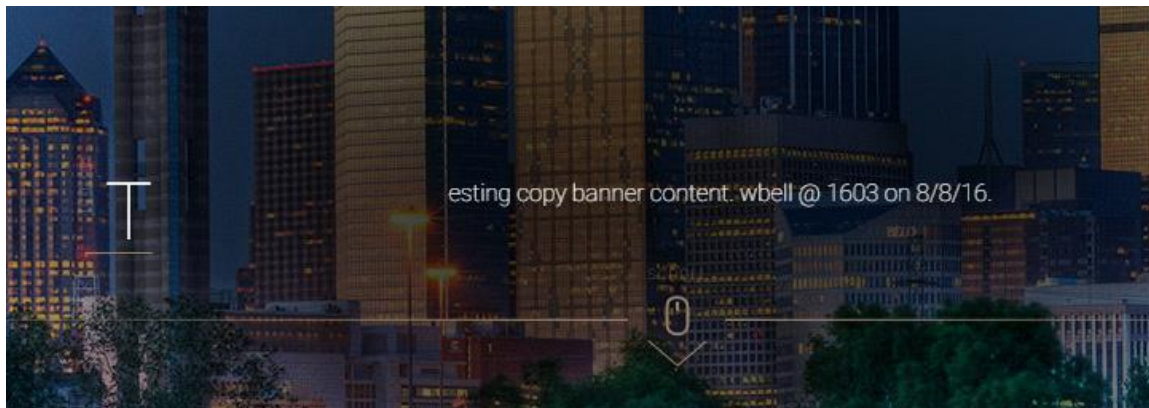
QA Audit 8/8/16

Monday, August 08, 2016 4:05 PM

Site name: wbell theme6 blended

1. HOMEPAGE

Copy of banner content takes the first letter and adds styling, but does not put that letter up against the sentence it was taken from. Looks disconnected:



2. ADAM FRANKFORT PAGE

- Adding photo through EE, right on the bio page, worked. But when I clicked on the Save icon I got an error in application page. However, the updated was reflected in Incognito preview
- When clicking onto Adam's photo on the about us page, it gives me the error page below. However, clicking on "view bio" works as designed (goes to his bio page)




ADAM FRANKFORT


[VIEW BIO](#)


3. TEAM RECOGNITIONS

Was able to add a rich text content block, but not able to copy. Error message: object reference not set to instance of an object. Also, an additional error message at top of page:

> Advisor Sites > Sites > w > b > wbell_theme6_blended > Home > About Us > Team Recognitions

 There are errors, notifications. [Less...](#) ▲


 The item does not exist. It may have been deleted by another user.

 The item is in the 'Draft' workflow state in the 'Advisor Sites Workflow' workflow. [Submit to Web Services](#) [Submit](#)

Copy Intro Text Content Component

us dedicated team of financial professionals is proud to have received recognition over the years


Copy Rich Text Content Component

 🏠

Copy Rich Text Content Component

This is Headline

Edit Alignment

 Team Tile

/* ARCHIVES */

Wednesday, August 03, 2016 3:06 PM

Niche/Blended Site Map Audit

Wednesday, June 22, 2016 10:43 AM

Homepage niche tiles:

- Sudden wealth - no image
- Family offices - no image
- Families & Business owners - has same image
- Venture Capital - no image
- Corporate executives - no image
- Women - no image
- Retirees - no image
- Non-profits - no image and no content/description
- Individuals - no image. Niche goes to document not found page.
- Business & Institutions - no image. Niche goes to document not found page.
- Endowments & Foundations - no image. Need adjustment on content breakpoints/column spacing. Content is falling beneath niche tile header at a medium sized window.
- Corporate retirement plans - no image. Need adjustment on content breakpoints/column spacing. Content is falling beneath niche tile header at a medium sized window.
- Healthcare professionals - no image. Need adjustment on content breakpoints/column spacing. Content is falling beneath niche tile header at a medium sized window.

Content Pages:

- Selling Your Business page not present in Individuals > Services
 - o Business planning page beneath Individuals > Services, needs to be either removed or renamed to 'Selling your business.'
 - o Need the below pages added to How We Help/Services
 - Key Client Partners
 - Selling Your Business

Silo Site Map Audit

Wednesday, June 22, 2016 10:43 AM

Content Pages:

- Selling Your Business page not present in Individuals > Services
 - o Business planning page beneath Individuals > Services, needs to be either removed or renamed to 'Selling your business.'
 - o No venture capital page for Services > Individuals
- Institutional Equity Sales: page in nav bar is titled 'Investment Equity Sales' but header 1 on page reads 'Institutional equity sales'
- Institutional Fixed Income Sales: page in nav bar is titled 'Investment Fixed Income Sales' but the page on the form is titled 'Institutional Fixed Income Sales'. Which one is correct?

Legacy Site Build Phases

Tuesday, June 21, 2016 4:48 PM

Phase I:

- Basic site settings (layout, site map, site name, color scheme)
- Deleting unwanted pages
- Selecting global content on pages where options are present

Phase II:

- Team member additions
- Bio copy and photos
- Group Logo
- Disclaimers/Disclosures (see bug reporting for more info)
- Image theme selection & confirmation on images
- Additional site settings (site owner & address verification)
- Team Headline
- Confirming on niche tile image placeholders

Freeform Content Block

Thursday, July 28, 2016 8:24 AM

There does not appear to be a free form content block like we had in SiteCore7. There doesn't appear to be a way to trick the system either, to add a block of non-preformatted html. (custom code)

The easiest way to accomplish this is with a rich text block
Content Editor Version:

- 1.) Open Data folder for site
- 2.) Open Components folder
- 3.) Open Rich Text Content Block folder (if it doesn't exist right click on components and hit insert, select rich text content blocks folder)
- 4.) Right Click Rich Text Content Block folder
- 5.) Select Insert, select Rich Text Content Block
- 6.) Enter your content

To Add it to a page:

- 1.) Select Presentation
- 2.) Select Details
- 3.) Select Edit
- 4.) Select Controls
- 5.) Click Add
- 6.) Select RJ/Advisor Sites/Global/Components/Content/Rich Text Content Block
- 7.) Placeholder is Page.Components or Home.Components
- 8.) Browse to your data source

Custom Page with New Content

Thursday, July 28, 2016 7:54 AM

Experience Editor Version:

- 1.) Click Insert Page
- 2.) Select Either Content Page or Landing Page (may be more options in the future)
- 3.) Name page whatever it needs to be called
- 4.) Whatever page you are on when you hit insert page will automatically be that pages new parent, creating a page on the home page should put it in the menu as a top level item, creating a page on what makes us different will make a sub item under what makes us different
- 5.) This will give you a generic page with some components, take out what you don't need, add what you do need

Content Editor:

- 1.) Right Click where you need the new page in the navigation (what parent item, etc).
- 2.) Select Insert
- 3.) Select Insert Content or Landing Page
- 4.) This will give you a generic page with some components, take out what you don't need, add what you do need

Custom Banners per page

Thursday, July 28, 2016 7:53 AM

Experience Editor Version:

To customize a banner per page, you will need to:

- 1.) Copy Banner Component
- 2.) Select Local Component
- 3.) Click Change Banner
- 4.) Select one of the default Banners from the Banner Image Drop Down, click save
- 5.) Click Copy Banner Image
- 6.) Open Content Editor, find that specific component (should be in SITENAME/Data/Components/Banners/Images
- 7.) Browse to the image you want to use, hit save
- 8.) In Experience Editor hit refresh

Content Editor Version:

- 1.) Open Data folder for site
- 2.) Open Components folder
- 3.) Open Banners
- 4.) Right Click Banner Folder
- 5.) Select Insert, select Insert Banner (this will be the main banner item that points to the other folders for custom content you need to do this step first)
- 6.) Insert new items under each area you need
- 7.) Under your main item select your new items
- 8.) Open Presentation Details for the page you are editing, look for either Large Banner or Small Banner
- 9.) Browse for your new item.

Add a Rich Text Block

Thursday, July 21, 2016 4:24 PM

Experience Editor Version:

- 1.) lock and edit page
- 2.) Scroll down to where you need to add the component
- 3.) Click the area you want to add it to
- 4.) click add here
- 5.) Select a rendering pop up will appear, select a component to add
- 6.) select a data source for this component, if this is custom data scroll down and select "Rich Text Content Block", this will populate dummy data into the component
- 7.) Click save
- 8.) click on "copy right text content component" select the plus sign clip board icon, to copy the component
- 9.) You will now be able to edit the items within the rich text block as needed

Sitemap Changes Made

Wednesday, October 26, 2016 8:43 AM

This section records any changes made to sitemaps at the admin level. These are changes where every site is touched.

To date:

1. Removed Key Client Partners and Monetization Services pages
2. Reset resources
3. Re-import people to ensure addresses are importing correctly

Landing Pages & What makes us different

Wednesday, October 26, 2016 8:45 AM

Subject	RE: Landing pages & what makes us different pages fix
From	James Hood - Veredus
To	Olivier Bizimungu; Whitney Bell - Skybridge
Cc	Dominic Cador; Jennifer Carpenter
Sent	Friday, October 21, 2016 10:59 AM

I have finished this, I will look over quite a few sites just to verify that I didn't miss anything.

JAMES HOOD
Web Administrator

Raymond James Marketing
T 727.567.5423 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

From: Olivier Bizimungu
Sent: Friday, October 21, 2016 7:54 AM
To: James Hood - Veredus <James.Hood@RaymondJames.com>; Whitney Bell - Skybridge <Whitney.Bell@RaymondJames.com>
Cc: Dominic Cador <Dominic.Cador@RaymondJames.com>; Jennifer Carpenter <Jennifer.Carpenter@RaymondJames.com>
Subject: RE: Landing pages & what makes us different pages fix

James, no content will be removed for this fix.

OLIVIER BIZIMUNGU
Senior Product Analyst

Raymond James Marketing
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880 Carillon Parkway, St. Petersburg, FL 33716

From: James Hood - Veredus
Sent: Friday, October 21, 2016 7:42 AM
To: Olivier Bizimungu; Whitney Bell - Skybridge
Cc: Dominic Cador; Jennifer Carpenter
Subject: RE: Landing pages & what makes us different pages fix

So, we are removing an entire section of content from sites, and that's the fix?

Did this content get nixed by compliance?

JAMES HOOD
Web Administrator

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From: Olivier Bizimungu
Sent: Friday, October 21, 2016 7:19 AM

To: James Hood - Veredus <James.Hood@RaymondJames.com>; Whitney Bell - Skybridge <Whitney.Bell@RaymondJames.com>
Cc: Dominic Cador <Dominic.Cador@RaymondJames.com>; Jennifer Carpenter <Jennifer.Carpenter@RaymondJames.com>
Subject: RE: Landing pages & what makes us different pages fix

This would be for any site that's currently live.

OLIVIER BIZIMUNGU
Senior Product Analyst

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From: James Hood - Veredus
Sent: Friday, October 21, 2016 6:48 AM
To: Olivier Bizimungu; Whitney Bell - Skybridge
Cc: Dominic Cador; Jennifer Carpenter
Subject: RE: Landing pages & what makes us different pages fix

Is this for AB sites? Or just RJ sites?

Theres only 1 RJ site in production (Barton Close, but he has custom content, some canned content too)

If this is for AB sites, just let me know, and I'll get started on it, no clue the ETA on this, as I'll have to touch on every single site.

JAMES HOOD
Web Administrator

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From: Olivier Bizimungu
Sent: Thursday, October 20, 2016 6:19 PM
To: Whitney Bell - Skybridge <Whitney.Bell@RaymondJames.com>; James Hood - Veredus <James.Hood@RaymondJames.com>
Cc: Dominic Cador <Dominic.Cador@RaymondJames.com>; Jennifer Carpenter <Jennifer.Carpenter@RaymondJames.com>
Subject: Landing pages & what makes us different pages fix

Follow up to the sitemaps email, below are instructions for the fix.

Let me know if you have any questions.

1) In the content tree, remove the Rich Text Content Block via the presentation details on the below pages from each site that has them.

On sites with a Silos sitemap

- /home/individuals/services
- /home/businesses-and-institutions
- /home/businesses-and-institutions/services

On sites with a Blended sitemap

- /home/services
- /home/services/services

2) On every “What Makes Us Different” page, browse to the presentation details and change the placeholder of the Rich Text Content Block from **Page.Components** to **Content.Components**



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