



## The Raymond James difference

Our firm is built on a foundation of client-first service. You are our priority – always.

Since our founding in 1962, Raymond James has focused on financial planning to help individuals reach their goals. We believe that when it comes to your money, there is no substitute for a carefully considered, disciplined investment approach that addresses your unique financial picture.

That's why our first priority is to establish an open and trusting rapport in an effort to discover what you need – and want – your money to do for you and your family. From there, we develop a tailored financial plan designed to help you get where you want to go. In short, our specialty is providing financial service that begins and ends with you.

### ABOUT RAYMOND JAMES

Raymond James is a publicly traded, global company with distinct business units that serve clients around the world. Headquartered in St. Petersburg, Florida, we have grown into one of the largest independent financial services firms in the United States. More than sixty years after our founding, we've remained true to the core values that made our growth possible – long-term planning, independence, integrity and client-first service.

### BY THE NUMBERS\*



APPROXIMATELY **8,700**  
financial advisors



**143** CONSECUTIVE  
quarters of profitability



APPROXIMATELY  
**\$1.26 trillion**  
in total client assets

\*As of 9/30/2023

## WORKING WITH YOUR FINANCIAL ADVISOR

As a client, you benefit from our in-house research and the knowledgeable guidance of an extensively trained, experienced financial advisor who will work to:

- **Understand your needs** – The process begins with getting to know you and your family while gathering information about your current situation, concerns and long-term goals.
- **Design a comprehensive plan** – Your custom financial plan is created, factoring in your time horizon and risk tolerance.
- **Implement your plan** – Your advisor puts your plan into action while working with other relevant professionals, such as a Raymond James specialist or your attorney or CPA, as needed.
- **Manage your plan** – Your financial plan is designed to evolve with you. Financial planning is an ongoing process and it's essential to review the progress of your investments within the context of your goals, adjusting as necessary.

## PARTNERSHIP WITHOUT COMPROMISES

Whether you're working with a financial advisor for the first time or trying to find a better fit, you deserve a knowledgeable partner you can trust with the management of your hard-earned wealth. At Raymond James, you have your choice of experienced financial advisors prepared to serve as your trusted partner and consultant. Even more, our clients benefit from comprehensive wealth planning services that rival even the largest brokerage firms – but with the family-friendly culture we've fostered for more than five decades.

Raymond James was the **first** in the nation to publish its **Client Bill of Rights**, setting the standard for the industry.

In **2022**, Raymond James once again earned a score of 100 on the **Human Rights Campaign's Corporate Equality Index**.

By earning a score of 100, Raymond James was recognized for taking concrete steps to establish and implement comprehensive policies, benefits and practices that ensure **greater equity** for lesbian, gay, bisexual, transgender and queer (LGBTQ) workers and their families.\*

# RAYMOND JAMES®

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\*The Human Rights Campaign Foundation is the educational arm of the Human Rights Campaign (HRC), America's largest civil rights organization working to achieve equality for lesbian, gay, bisexual, transgender and queer (LGBTQ+) people. Neither Raymond James nor any of its financial advisors or RIA firms pay a fee in exchange for this award/rating. Raymond James is not affiliated with the Human Rights Campaign Foundation.

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