RAYMOND JAMES

Corporate profile

Raymond James Investment Services Limited is part of the UK Private Client Group of Raymond James Financial Inc., a diversified financial services company headquartered in Florida, USA.

We offer a full support package to independent wealth managers, including:

- Open architecture environment
- Research tools
- Client reporting
- Technology solutions
- Comprehensive regulatory oversight
- Professional Indemnity Insurance

Raymond James is a wealth management firm focused on providing trusted advice and tailored, personalised investment services. We currently support over 100 practices, which represent a mix of private client investment managers and investment-focused financial planners. We commenced operation in the UK in 2001 and now have over 50,000 client accounts representing total assets of £18.18 billion.

By offering our wealth managers access to a broad range of assets and tax wrappers, investment selections can be made based on your unique needs.

About Our Parent Company - Raymond James Financial, Inc.

Founded in 1962 and a public company since 1983, Raymond James Financial, Inc. is a diversified financial services company. Approximately 68% of the firm's revenue is generated by the Private Client Group, which is engaged in wealth management activities. In addition, Raymond James Financial has businesses focused on equity and fixed income capital markets, asset management and banking.

Raymond James is committed to putting clients' interests first, to acting with integrity, and to managing on a conservative basis with a long term view. This is a commitment that has led to 147 consecutive quarters of profitability.

Raymond James currently works with approximately 8,700 wealth managers located in the US, Canada and the UK. These wealth managers service accounts representing total assets of $1.57 trillion. For more information on our parent company please visit www.RaymondJames.com.

Products and services

We offer unprecedented access to a broad range of assets and tax wrappers and don't require wealth managers to use any inhouse products, so they can select the right investments for you on an unbiased basis.

For investments, we offer access to all asset classes, including:

- Equities, bonds, investment trusts and Exchange Traded Products (ETPs) traded on all major markets
- Raymond James is a London Stock Exchange member firm; our direct market access provides efficient and cost effective trade execution in real time with no additional third party broker fees for retail trades in London listed securities
- Funds (UK registered and offshore funds; GBP, USD, Euro share classes)

We also provide access to a full range of tax wrappers, including:

- ISAs and JISAs, with Raymond James as the ISA manager
- Pension wrappers, offered by 50+ pension administrators, including SIPP, SSAS, QROPS and QNUPS
- A range of offshore portfolio bond wrappers

Why choose a Raymond James wealth manager?

Our emphasis on putting clients first is at the core of our values. We are rooted in our commitment to take care of you and your wealth manager and believe that choice is crucial.

By offering wealth managers access to a comprehensive selection of products and tools, in addition to robust compliance and supervision services where appropriate, we enable them to meet your individual investment needs.

With Raymond James providing dedicated support, wealth managers can concentrate on what they do best: creating unique wealth management solutions to meet their clients' needs