

Trading and Rebalancing

Raymond James' award winning trading and rebalancing system provides institutional quality trade generation, portfolio modelling and rebalancing tools. Our trading solution provides simple and intuitive functionality, reducing your time spent managing portfolios.

The model comparison tool provides graphical representation of portfolio positions against agreed tolerances, allowing you to rebalance quickly, efficiently and cost effectively. Maintain your own trading preferences for more control over the trading process. The Raymond James Trading and Rebalancing system better equips you to manage your clients' investments and to manage risk.



Systems integration

The system is delivered as an integrated technology solution. You will access all trading functionality within the Raymond James Portal, eliminating the need to login to a separate trading system.



Visibility of trade charges and commissions

To help you better understand the costs associated with trades, trade charges are calculated and displayed, wherever possible. The platform also allows for full transparency of costs and charges associated with a trade, so you can execute a trade confidently.



Simplified trading process

Trading is made simple with the highly intuitive Trading and Rebalancing platform. The system is easy to use and only a minimal amount of keystrokes are needed to execute a trade. Our platform also gets you trading quicker, with multiple ways to submit a trade.



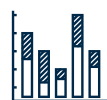
Ability to add your own trade restrictions

Set up and maintain your own trade restrictions at various levels including office, portfolio level and at the sector level. Take control of your trading process.



Visual model comparison

In addition to your standard tabular views, the system features graphical model comparison tools, making it easier to view portfolio drifts.



Ability to create models

Create models and link them to specific portfolios allowing for increased transparency to see where your client is in comparison to a set model.

Ongoing Training and support

Wealth Managers working with Raymond James are given full training on the system and also have access to both our Client Services and Training teams for ad-hoc queries and on-going support, to ensure they are getting the most out of the Trading and Rebalancing system.



Raymond James' trading and rebalancing system allows us to run our discretionary portfolios with ease and efficiency.
Wayne Hayhurst – Chartered Wealth Manager and Branch Principal

For more information on Raymond James' Branch Technology Package contact the Branch Solutions team:



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