

Raymond James Investment Services Limited has been offering trusted advice and personalised wealth management solutions in the UK since 2001. Our parent company, Raymond James Financial, Inc. has been doing the same in the US for over six decades. With more than 300 wealth managers, we now have over 50,000 client accounts and look after more than £18.18 billion in client assets in the UK.

We provide tailored investment management and financial advice to individuals and their families. We also provide investment management services to charities. As part of the core Private Client Group of Raymond James Financial, Inc. we benefit from the size and scope of a well-established, profitable and diversified financial services firm.

### 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 our clients and their wealth managers 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, we enable them to meet their clients' individual investment needs.

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

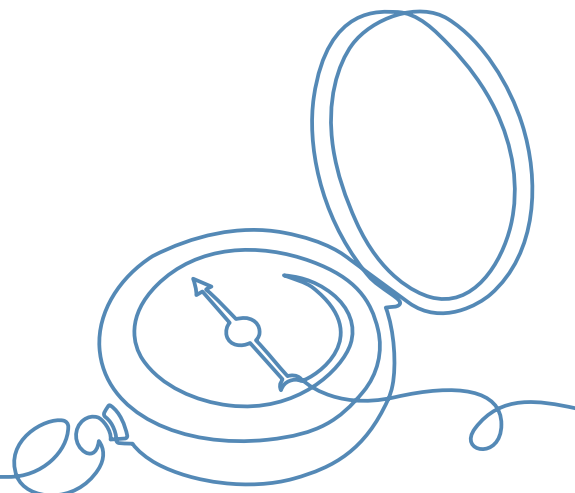
### About our parent company

Founded in 1962 and a public company since 1983, Raymond James Financial, Inc. is a diversified financial services company, headquartered in Florida, USA.

Raymond James currently works with over 8,700 wealth managers located in the US, Canada and the UK. These wealth managers service accounts representing total assets of approximately \$1.57tn.

On 30 September 2024 Raymond James Financial announced 147 consecutive quarters of profitability. This milestone is a reflection of our parent company's long-term vision and conservative business approach, as well as a testament to Raymond James' strength and stability. For more information on our parent company please visit [raymondjames.com](https://raymondjames.com).

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## Products and services

We offer unprecedented access to a broad range of assets and tax wrappers; our wealth managers can select the right investments for their clients 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.

## Our offering to wealth managers



**Institutional  
research**



**Secure  
infrastructure**



**Comprehensive  
reporting**



**Sound financial  
foundation**

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