



Raymond James Ltd. (2001-2021)

ASSETS UNDER ADMINISTRATION

2001

Sept. 1, 2001

\$4.5B

2006

\$10B

2012

\$20B

2015

\$30B

2017

\$40B

2019

\$50B

2020

\$53B

2021

2001

Goepel McDermid joins forces with Raymond James Financial to launch Raymond James in Canada



2011

Montreal corporate branch opens

2012

The Raymond James Canada Foundation is established



2013

Canadian Network for Women Advisors is launched



First RJ Cares Month, a month long initiative designed to celebrate and strengthen our passion for volunteering and teamwork. Each May, colleagues across the country focus their energy on team volunteer activities, donation drives, and charitable initiatives in their communities



2015

Raymond James Financial completes Cougar Global acquisition

Raymond James named to Canada's Top 100 Employers for 2016.



2017

Raymond James named to Canada's Top 100 Employers in Canada



Mérites du français 2018 competition of the Office québécois de la langue française - Raymond James was a finalist in the Organization of more than 100 employees (based in the province of Quebec), Client Service category in the Mérites du français 2017 competition of the Office québécois de la langue française

Raymond James Financial to join S&P 500

Raymond James' banking arm reaches five-year milestone in Canada, surpassing \$2 billion in loan commitments

Over 500 Raymond James employees and associates volunteered 2,025 hours in support of 75 charities, making positive impacts in their communities by donating their time and talents. 2,429 pounds of non-perishable food items were collected and \$6,899 was raised for food banks across Canada



2019

Raymond James Ltd. is again recognized by Imagine Canada as a Caring Company for signing the Corporate Citizenship Commitment and demonstrating leadership in community investment in Canada



Diversity & Inclusion Council launches inclusion networks get involved

Raymond James Ltd. Announces Launch of Quebec Trust Company Subsidiary to Add Trust Company Services To its Full Service Offering for Quebec Clients

RJ Cares Month: A record 814 Raymond James employees and associates volunteered 3,330 hours in support of over 150 different charities!



Raymond James Ltd. is recognized as an Employee Recommended Workplace for 2019

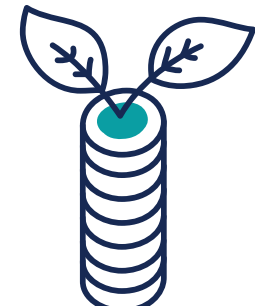
Raymond James again named one of B.C.'s Top Employers



2020

Raymond James Trust (Canada) now registered to offer fiduciary trust services to select clients in the province of British Columbia, Alberta, Saskatchewan, Ontario and Québec (the latter through Raymond James Trust (Québec) Ltd.)

Raymond James Memorial Fund launched as a legacy to honour colleagues who have passed



Jan. 2021

20 years of growth in Canada



2009

Montreal Charity Day is launched. This fundraising initiative has been going on for 12 years and has raised over \$1.3 million

2012

Acquisition of Allied Irish Bank's Canadian platform to launch Raymond James Bank in Canada

Raymond James (USA) Ltd. is launched. "RJLU" - is a Canadian-based U.S. registered investment firm offering specialized advice to Americans living in Canada and Canadians living in the U.S. for their cross-border investment needs.

2014

Imagine Canada recognizes Raymond James Ltd. for our leadership and excellence in community investment

2015

RJ Cares Month - Raymond James colleagues across Canada volunteered 1,349 hours within their communities and donated more than 650 lbs. of food. Over 60 organizations benefitted.



2016

Raymond James Ltd. ranked second highest in overall investor satisfaction according to the J.D. Power 2016 Canadian Full Service Investor Satisfaction Study. Our firm ranks in the top three consistently over the past eight years. Read the press release by J.D. Power.

3Macs becomes 3Macs Division of Raymond James Ltd.



Raymond James Investment Counsel (RJIC) is created as part of the 3Macs acquisition - RJIC is a provincially registered portfolio management firm

Raymond James raises \$767,945 for over 300 charities across Canada through its Annual Giving Campaign.

2018

Mérites du français 2018 competition of the Office québécois de la langue française - Raymond James was a finalist in the Business and Information Technology category for organizations with more than 100 employees (based in the province of Quebec)

Raymond James Named one of B.C.'s Top Employers



2020

Raymond James Ltd. Employee Recommended Workplace for 2020



Raymond James again is named one of B.C.'s Top Employers

Raymond James Ltd. Recipient of the 2020 Employee Recommended Workplace award



Workforce moves to 95% virtual / remote services in response to Covid-19 pandemic

Network for Women Advisors rebrands as Women Canadian Advisors Network



Women Advisory Council (Canada) launched

Raymond James acquires Canadian trust company, plans estate-planning division

Raymond James Ltd. is Great Place to Work Certified



Annual Giving Campaign raises \$1.35 million for 550 charities

