FOR IMMEDIATE RELEASE

Raymond James Ltd. Welcomes Michelle Connolly, CPA, CA, TEP, FEA, CFP as Head of Financial Planning and Insurance Solutions

TORONTO – June 10, 2024 – Raymond James Ltd., the Canadian arm of North American investment dealer Raymond James Financial Inc., is pleased to announce the appointment of Michelle Connolly, CPA, CA, TEP, FEA, CFP as Head of Financial Planning and Insurance Solutions within its Wealth Solutions group, effective May 29, 2024. Ms. Connolly, working closely with the leadership team and in-house specialists, will play a pivotal role in enhancing the delivery of Raymond James' Total Wealth Solutions, including financial planning, insurance and tax consultancy, focusing on supporting the firm's corporate and independent advisor networks and their client families.

A CPA, CA, CFP, TEP and FEA, Ms. Connolly has more than 20 years of invaluable experience in the wealth, insurance, estate and trust planning industry, cultivated through diverse roles, including in private practice at a large multinational accounting firm. Her most recent position was Senior Vice-President, Advanced Wealth/Tax and Estate Planning for another Canadian wealth management firm.
"Michelle's track record of strong leadership and mentorship, coupled with her thoughtful, proactive approach to delivering customized client solutions makes her a great fit for this strategic role," says Jennifer Hodgson, SVP, Head of Wealth Solutions, RJL and CEO, Solus Trust Company/Raymond James Trust (Québec) Ltd. "We welcome Michelle as a valuable member of the Raymond James team helping to build on the firm's continued momentum."

"Advisors who have crossed paths with her in the past have reached out and are sharing their excitement," said Jamie Coulter, CEO. "We are all thrilled to welcome Michelle and her extensive experience to the firm and look forward to working with her and the wider team in supporting our Total Wealth Solutions."

"It's an exciting time to be joining Raymond James, a firm I have long admired for its inclusive culture, engaging executive team, belief in independence and commitment to putting clients first," said Ms. Connolly. "I'm looking forward to working with Raymond James advisors to provide Total Wealth Solutions that meet the evolving needs of their clients, while contributing to the firm's strong growth trajectory in Canada. In addition to its various advisory service platforms, Raymond James' support of client and corporate philanthropy intentions and offering corporate trustee services across Canada clearly demonstrate its investment in, and understanding of, Canadian wealth needs."

About Raymond James Ltd.

Raymond James Ltd. is the Canadian arm of Raymond James Financial, Inc., one of North America's leading full-service investment dealers. Raymond James was established in 1962 on the principle of always putting the needs of clients first. Today, this principle remains the foundation on which the firm continues to serve individual and institutional investors, as well as corporate issuers. Through its network of approximately 8,700 financial/investment advisors and portfolio managers across Canada, the United States and key international centres, Raymond James Financial, Inc. and its affiliates manage more than US $1.45 trillion in client assets under administration. For more information, please visit www.raymondjames.ca.

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