

RAYMOND JAMES

THE CULTURE

CELEBRATING OUR CLIENT-FIRST VALUES OF INTEGRITY, INDEPENDENCE AND LONG-TERM THINKING

STRONG FOUNDATIONS,

BOLD FUTURES

Change is inevitable, but becomes intentional with a strong foundation

PLUS

ADVISOR
PROFILES

BRANCH
HAPPENINGS

NEW TO
THE FAMILY

AND MORE ...



Jodi Perry, National Head of Advisor Recruiting, shares her insights on leading positive change with effective planning, building trust and empowering others in the process.



Find out how the Succession & Acquisition Planning team helps advisors preserve client satisfaction and business continuity with strategic support, personalized exit planning and powerful technology tools.



SUGGESTIONS? The Culture, a magazine for and about the Raymond James advisor, is proudly written and designed by the Raymond James Marketing team. Contact us at TheCulture@raymondjames.com to tell us what you like, what we can improve, your suggestions for subjects you'd like to see covered or anything else that's on your mind.

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TOM WALROND
President
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Let us know what you think about The Culture. Send your feedback and ideas to TheCulture@raymondjames.com.

Strong foundations offer opportunities

We possess great strength in the foundations our firm stands upon, and on that footing, we can be purposeful about navigating change. In part, the strength of our foundations stems from the deep roots of our people-first culture – an integral yet everyday part of our firm we can all share credit for cultivating.

This issue of The Culture centers around the theme of building on our strength to embrace change in intentional, positive and productive ways.

Featured in this issue, In Your Corner spotlights **Succession & Acquisition Planning**, a team that is no stranger to helping advisors and their own professional teams through periods of major or unexpected transitions.

As for our featured advisors, **Tom Seiler**, managing director of The Seiler Group, shares his inspiring story about transforming his Olympic ambitions into financial mastery. In addition, **Rebekah Fa'asau**, managing director of Fa'asau Wealth Management, reveals how her passion for work and focus on social media are revitalizing her business.

To top off our Fall issue, we're confident you will find our National Head of Advisor Recruiting **Jodi Perry's** strategic insights about nurturing positive change a noteworthy addition.

Time and again, The Culture magazine highlights the strength of our culture at Raymond James. Our strong foundation not only allows us to embrace change and new opportunities, but also equally underscores the value of empowering our people.

Happy reading,



Going after
GOLD

HOW MASTERING FINANCES
BECAME **TOM SEILER'S**
NEW OLYMPIC GOAL

Advisor Tom Seiler had one ambition in life, to be in the Olympics. And by all accounts, he was on his way. He received a wrestling scholarship to a highly ranked Division 1 college and dedicated his life to the sport.

“But I got derailed in my first year of college, and it’s what redirected my energies, motivations – and life,” he says. “My dad died. And after I came home, I found out my parents didn’t have any financial plans. My mom didn’t understand where she stood financially. There were no emergency funds for the unexpected.”

Tom was concerned for his mother – and for himself, who now had a major responsibility falling on his shoulders. He decided to give up his scholarship to help his mother and two younger siblings get back on their feet. His parents had a business as well, so Tom not only helped his mother get the household back on track but had to run the business too.

“I decided to put my dream of going to the Olympics on hold for the time being,” he says. “My new Olympics was understanding finances.”

ATTENTIONAL FOCUS

After supporting his family, Tom went back to college and earned a degree in finance. He thought he could use his newfound knowledge and somehow be involved in sports but wasn’t sure how it would all come together.

“As I started my career, I was motivated to work with successful entrepreneurs and young professional athletes,” Tom says. “One day, I was sitting in Louisville, Kentucky with the head trainer of the local college football team. And while I was there, he was visited by three NFL athletes who had just retired. I asked him who they were and why they were visiting. He said, ‘Tom, they were here because they’re dead broke and they’re looking for a job.’ I could not believe it. Then he asked, ‘Why aren’t you managing money for athletes?’ I knew I could be helping these young guys with their money and teach them the right way to do things from the start.”

And then, Tom says, it all clicked. “I knew I could use my experience working with successful entrepreneurs to help underserved young athletes. I said to myself: I’m going to dedicate some energy to building a business to manage money for athletes.”

So, that’s what he did. It’s a long game gaining professional athletes as clients. It takes a lot of touchpoints and nurturing for them to gain trust and confidence. It’s taken Tom decades to build a client base

that’s 70-80% athletes. Referrals are a powerful source of new clients these days.

The relationship with athletes centers around trust. And it’s equally as important that Tom has trust in his team to care for clients by providing the highest level of service. His brother Patrick acts as a mentor to young team members, teaching them advanced financial planning techniques, and the practice’s assistants provide concierge service to clients on a daily basis.

Tom has built a sophisticated team that’s focused on tracking the best athletes in the country in every sport – from high school through college then in the professional arena. He’s able to build a powerful relationship over time and have the chance to help them manage their money upon signing that first massive contract.

“That first contract is critical,” Tom says. “You have to do the right things with your assets from day one and, unfortunately, many athletes don’t do that. That’s because we all feel like we’re invincible. As humans, we are naturally optimists. But we need to plan for worst case scenarios, so our clients are prepared.”

Professional athletes aren’t looking for something wildly different in an advisor than other clients. They want the process to be simplistic and transparent. And they expect access to other financial professionals, like accountants, tax attorneys, estate planners and lawyers.

Having Raymond James’ team of professionals that he can tap on helps Tom deliver a holistic experience for his clients. It’s essentially like providing a concierge service.

“First, you do everything in your power to understand client needs and objectives, then you go out of the box and put together a financial plan that’s designed and implemented for the benefit of the client,” Tom says. “If you do that, the client will stay with you for eternity.”

The remainder of Tom’s clients are C-suite professionals or entrepreneurs. He says there’s little difference in how he treats each group of clients. Understanding the individual and their aspirations is at the heart of delivering exceptional customer service – and making them feel like they’re family.

TEAM BUILDING

Exuding the culture of Raymond James, Tom cultivates a client-first approach in his practice. He expects every team member to know the highlights of each client and creates an at-a-glance profile they can study to make sure they’re up to speed. This summary gets amended every time they meet with the client or learn something new about them.

“We build a story about our clients from day one,” Tom says. “Our employees are not just answering the phone; they know what dream or goal they’re trying to help our client achieve. It gives our team a little bit more purpose coming to work in the morning. My teammates Ross, MG, MM, JB, and Isaiah know clients like family.”

And this motivation is exactly what Tom is looking for in team members.

“I made mistakes early on in my career when it came to hiring. I found out that some people weren’t motivated in the same way and didn’t have the same aspirations as I did,” Tom says.

That’s when he decided an internship program would create a strong pipeline of candidates, and he’d have the chance to get to know potential employees before making them a permanent offer. The Seiler Group has three to seven interns on the books at any given time, from high school students to college graduates. And many of them come back for multiple terms.

Tom lights up when talking about the internship program because it’s the future of the practice. He seeks out ways to excite them, like hanging a cowbell in what he calls the “bullpen,” that they can ring when they open a new account or experience some other kind of win.

“We really built a team that’s generational. The idea was to build a team that will emulate the growth of any client,” Tom says. “We share that with our clients, so they know that we plan on being around and earning their business and their confidence for a lifetime.”

PLANNING FOR VICTORY

No one knows better than Tom that sometimes life doesn’t go the way you expect it. And this is not only part of his personal philosophy but a driving force in his practice.

“My guiding principle is to have an ethical background built on integrity,” Tom says. “I know I can’t assume what’s going to happen day to day, so I try to think about those unpredictable events. It could be a change in anything in the world.”

Tom sees it as his job to have those conversations with clients. Education is everything.

“An athlete can pull their patella from their kneecap, and their career is over instantaneously. If they didn’t prepare from day one, they may not have an idea of how they’re going to sustain themselves.”

So that’s why Tom and his team walk through all possible life events with every single client. He expects each client to leave their conversation knowing what their “number” is, meaning if income stops instantly, what assets do they need to have invested in order to continue their current lifestyle and monthly spending budget.

With that “magical number” in mind, clients know what their savings goals should be.


“And we’re going to help them develop a very strategic, conservative financial plan to meet those objectives, designed so they’re never worried about their situation,” Tom says.

His clients reach out to him for any financial question they may come across and that’s a testament to the relationship they’ve built over time. Sometimes it’s about how to prepare for an upcoming marriage or whether they should lease or buy a car.

For athletes, it’s often about their vision for their next phase of life. They know being a professional athlete is not going to be their occupation forever.

“They want to plan for the next stage,” Tom says. “Whether it’s in the music business or owning a franchise or starting a medical group or owning real estate – wherever their passions may lie.

We want to understand our clients and what their dreams are. It’s not our job to tell people what to be or believe in. It’s to understand what they want to do in their life and then help them create a financial situation that will allow them to do that. That wealth is freedom.”

And that freedom means being prepared for whatever life brings – and coming out victorious. 





TOM SEILER, WMS™

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Finer points

WHAT'S THE BIGGEST CHALLENGE IN DEALING WITH PROFESSIONAL ATHLETES?

Most of the time, young athletes don't have a lot of life experience, and they have a lot of people surrounding them, trying to influence them to spend money in ways that may not be best for their future. That's why building a trusting relationship and educating them from the outset is so important.

IN PLACE OF WRESTLING, WHAT DO YOU DO FOR RECREATION THESE DAYS? I'm an avid bike rider, I run, I swim. I love gardening, particularly planting perennial flowers. Because of my Olympic goals, I've always tried to find ways to alleviate stress. I meditate every morning, do ice plunges and vita drips. It keeps me going.

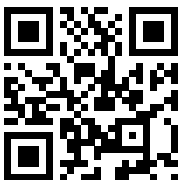
WHAT ADVICE WOULD YOU GIVE TO AN ADVISOR JUST STARTING OUT? Find your niche in the financial arena. Find what your passion is and decide early on what you want to achieve. Make yourself a professional in that field specifically, and gain experience by working with advisors who have been there before you.

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Purpose and passion

How Rebekah Fa'asau is using pivots – to a new firm and to video – to share her love for the work she was born to do.



When clients work with Rebekah Fa'asau, they aren't getting Advisor Rebekah or Burgeoning Content Creator Rebekah or Mom and Wife Rebekah or the Rebekah who still starts every single day reading about the markets ("dorkily," by her own description) armed with her highlighters, notebooks and iPad.

Clients get all of those Rebekahs. Because there's no separating who Rebekah is from what she does.

"I feel so blessed that my career is also my calling; they're one and the same. Not many people can say that, and that's where my passion truly comes from."

This passion – for every facet of her life and every minute of her well-structured days – is evident when you speak with her. She talks about her work with an enthusiasm and unselfconscious emotion that draws people in, that reminds clients "This is important work we're doing, and I care about it as much as you do."

These core qualities, along with her curiosity, diligence and knack for organization, catapulted her to success as a financial advisor – and to a comfortable plateau in her business. But "comfortable" can only keep people like Rebekah satisfied for so long. With her goals outgrown, she knew her next step needed to be a new challenge.

PLANTED SEEDS

Rebekah's finance origin story began in college, but not in the usual way. She was a marketing major, far down the path to graduation, when she took a class that changed everything.

"I had to take a finance course for my degree, and that's when I fell in love with the capital markets. I considered changing my major, but I was too close to finishing. Still, the seed was planted," Rebekah said.

It wasn't long before finance found her again, in the form of a run-in with a friend who had been interning for a Merrill Lynch advisor. "He came up to me saying, 'Where have you been? I've been looking for you!' There was an opportunity, and he'd already told them all about me."

That's how in August of 2006, Rebekah found herself opposite that advisor, and over about two hours and a dry erase board, he explained what it meant to be a financial advisor.

She fell in love with finance again.

Like many in her cohort, Rebekah's early days as an advisor were spent on a phone. Before email blasts and paid LinkedIn posts, there was cold calling. And Rebekah, who started her career in Texas refinery country, had a directory full of oil industry contacts.

““ I feel so blessed that my career is also my calling; they're one and the same. Not many people can say that, and that's where my passion truly comes from.””

– REBEKAH FA'ASAU

Success came quickly. Rebekah found herself connecting easily with clients, her passion and competence shining through in one-on-one meetings over cups of coffee. Her easy rapport in combination with her finely detailed, process-oriented approach to business translated to loyal, long-term relationships.

The growth continued in her business, and in her life, with the birth of her first child in 2015. She scaled back her time in the office to be more present with her son, but eventually worked back up to a full schedule and the success went on apace.

Soon, however, came the "but," the little voice that says everything is great, but it could be even better.

"I felt complacent," Rebekah revealed. "I wasn't marketing myself. I wasn't hosting client events. I was leaving parts of myself out of the process."

She was pondering the best ways to bring all of herself back to the table, when her husband suggested seeking inspiration from an unlikely source: social media.

"Both of us had gotten off of social media about eight years prior. When he decided to run for local office in 2020, he knew he had to dive back in to run a competitive campaign. He hired a social media consultant he'd found on TikTok, and after seeing the traction it created for his campaign, he said to me, 'I think this would be really great for your business.'"

The firm Rebekah was with at the time presented her with relatively limited options when it came to digital marketing. Fortunately, she had already been in talks with Raymond James. "Knowing I would be able to leverage social media here, it planted a seed."

A BUSINESS REBORN

The decision to join Raymond James and the transition that ensued is something Rebekah says she would do again in a heartbeat. “It’s the best thing I’ve ever done besides get into this business,” she said.

That doesn’t mean the process was without its own trials and tribulations.

Rebekah characterizes the move as a rebirth, but it was also a revelation. With the goal of launching a substantial social media presence, primarily through video, how would she ensure her passion translated as well over Wi-Fi as it does across a conference table? How would she reveal the parts of herself to a potential audience of thousands that earn her such loyalty one-on-one?

“It was like putting a mirror up to myself, and it was really uncomfortable in the beginning. As outgoing as I am, I don’t like talking about myself – I’ve gotten so used to being the one asking questions and listening, because that’s my job. But it was so empowering to realize, this is my book and I’m going to write it the way I want.”



Since she was essentially a social media neophyte, Rebekah, ever the student, looked to the people around her for guidance. Ali McCormack, a senior registered client service associate who has been a foundational part of Rebekah’s practice for eight years, was one of the “younger people” that helped get her up to speed. “I’d ask her, OK, what’s a story? What’s a reel? What’s the difference between Facebook and Instagram? It was a huge learning curve.”

The team spent most of the fall of 2023 planning and then three solid months in production prep mode before launching the first videos on Facebook, Instagram, LinkedIn and YouTube in March of 2024.

So far, her passion is coming through clearly. “It’s created unbelievable traction in getting my business going again here at this new firm, and it’s just starting.”

LEAPING WITH FAITH

If there’s one thing that has been with Rebekah at every moment of her life and career, it’s her faith.

“There’s a saying that the two pivotal moments in a person’s life are the day they were born and the day they find out why they were born.”

Rebekah’s “why” made itself clear in August of 2015.

“I was on a beach in Mexico with my husband a few months before our son was born, reading a book about purpose. I had this moment where it felt like something profound dropped inside of me, like a 50-ton brick. It was divine – a clear confirmation that I was already living my purpose, doing exactly what I was meant to do.”


That sense of purpose, even if it took time to be revealed to Rebekah herself, is something the people around her have always seen clearly.

When asked how those closest to her would describe her, Rebekah said, “I figured I could either guess what they’d say, or I could just go ahead and ask them.”

So, she asked and shared their replies via email. The picture they paint is of a woman who has always known her heart, who has pursued her goals with diligence and dedication, and whose passion people can’t help but be inspired by.






“There’s a parable in the Bible about a man who knocks on his neighbor’s door in the middle of the night to ask for bread for unexpected guests. Eventually, the neighbor gives in, not because of friendship, but because of what the passage calls his ‘importunity,’ meaning ‘shameless audacity,’” she explained. “It’s about being bold, unapologetic and relentless in pursuing what you feel called to do.”

After just an hour with Rebekah – or even watching one of her videos – it’s clear how deeply that lesson has shaped both her life and her business.

“This is the beginning of something great. That’s what it feels like right now.” 



REBEKAH FA'ASAU, CRPC™
Managing Director, Financial Advisor

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Finer points

WHAT'S YOUR BIGGEST PIECE OF ADVICE TO ADVISORS? Practice gratitude. I've been doing that since I was a teenager, and it has opened the door for so much opportunity and favor in my life. I've done a lot of reading on the subject and learned that some of the most successful people in the world – leaders, billionaires – have centered gratitude in their lives.

SHARE A FUN FACT ABOUT YOURSELF. I am obsessed with sprinkles. I love baking with my children – they're the happy beneficiaries of it. It's become a running joke in my family. I have an overflow supply already, but I can't stop myself from buying more when I spot them in the grocery aisle.

WHAT BOOK ARE YOU READING RIGHT NOW? I'm currently reading "Dream It, Live It, Pin It" by Terri Savelle Foy and "The 21 Irrefutable Laws of Leadership" by John Maxwell. I'm always reading, and two of my all-time favorites that have been with me for years are "Think and Grow Rich" by Napoleon Hill and "Over the Top" by Zig Ziglar.

Elevate the Conversation.



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JODI PERRY

*National Head of
Advisor Recruiting*

FINER POINTS

ACTIVE TRAVELER: Traveling and working out are two of Jodi's favorite hobbies that go hand-in-hand. "I recently went to Norway with friends for an active trip – hiking, cycling and kayaking."

COLLEGE EXPERIENCE: Jodi is a graduate of the Program for Experienced Learners at Eckerd College. "My life took a few turns before I finished college, so I was a bit older than college age when I graduated."

HUMAN BEHAVIOR: "I've always been interested in psychology. I like to understand not just what people do, but why they do it."

PLUGGED IN: With so much to read, watch and listen to these days, being habitually connected is one of Jodi's personal challenges. "I'm working on giving myself meaningful breaks from technology, but it's difficult."

PERSON *to* PERSON

In her 30 years at Raymond James, Jodi Perry has seen a lot of change and, in many cases, taken an active role in it. She was the first woman to be a recruiter and division director, and the first to lead a Private Client Group division. On the heels of her five-year tenure as the president of the Raymond James Independent Contractor Division, she's now the National Head of Advisor Recruiting. She spoke to us recently about her process for positive change leadership.

In any type of leadership role, you have a choice – take the opportunity to think about doing things differently now or wait until the world around you has changed and play catch up. Either way, change is inevitable.

I love a new project. There's something I really enjoy about the process of identifying something that needs addressing, discovering what the solutions could be, then getting people on board to see them through. But I realize that's not the case for everyone.

So how do you lead change when people around you resist it? You need to have a plan.

Start with the big picture. Identify the issues, then look at them through the lens of your goals and values. In a practice, that could be business growth or enhanced client service. In the home office, we ask, "Is this better for advisors?"

Another good question to ask is, "Does what we're doing make sense five or ten years from now?"

Once you've identified a challenge in need of a solution, the next step is figuring out who cares. Who needs to be involved in the decision making? Keep in mind: One thing you learn over time is that leaders don't want you to just identify a problem, they want you to propose a solution.


The next step is to create your pitch. Just because a problem is obvious to you doesn't mean everyone else will see it that way, and you'll need allies to join your efforts.

When you're creating your pitch, think about how your plan will disrupt or benefit your colleagues' work. It can't be just about you – you have to understand how people will be impacted by the change. Consider their goals and find a way to make them work with yours.

Next, identify your partners – the people who see your vision and support you – and start getting traction. Once people see progress, more of them will buy into your plan. To be trusted to lead change, you need to build trust.

Be transparent about the process, get feedback along the way and be willing to adjust. The process should keep you moving forward and prevent you from getting sidetracked. As the person who's been thinking about this issue the longest, you'll inevitably want it to go faster. Check your ego and trust the process.

Furthermore, change is not solely the domain of leadership – it can come from anywhere. In fact, it often begins on the ground floor.

Wherever it comes from, change will happen – you can count on it. With a plan, it can happen without difficulty. 



Rob Goff, Vice President, Succession & Acquisition Consulting
and **Joanna Bever**, Succession & Acquisition Manager,
Raymond James & Associates

IN YOUR CORNER: SUCCESSION & ACQUISITION PLANNING

Planning for you like you plan for your clients

Day in and day out you help your clients plan for and safeguard their futures. But when was the last time you followed your own sage advice?

Whether you're building your book of business or starting to think about retirement, it's never too early to develop a plan to ensure your business and clients are set up to succeed when you decide to step away. In the face of any type of change or evolution, planning is key.

The Succession & Acquisition Planning team is dedicated to helping Raymond James advisors navigate unexpected changes and recognize the future opportunities that come with business acquisition and succession.

PRESERVING LONGEVITY AND FACILITATING GROWTH

Succession & Acquisition Planning is driven by the purpose to listen to advisors.

From buying or selling a practice, to exit planning and retirement, you know your vision better than anyone. The team prioritizes empowering advisors, like you, to take full advantage of the opportunities you've built and nurtured through personal guidance, intelligent tools and working closely with you through the finer details of your unique situation.

So much so, 85% of advisors reported their satisfaction with the team's responsiveness to inquiries, operational and/or closing procedures and documenting of the sale.

You can access one-on-one consultations at any stage – before, during or after signing a purchase or catastrophic agreement. These consultations cover areas such as cash flow modeling, deal structuring, practice pricing and team building.

Raymond James advisors can utilize Practice Exchange, a resource-rich, online community hub offered by the firm. This platform connects advisors at every career stage,

offering a range of tools to help evaluate your practice; match you with the right buyers, sellers and partners; and assist with document reviews.

Why? Because having as much flexibility as possible allows you to create the right plan for your clients, your successor and yourself.

DETAILED PLANNING FOR LIFE'S DIFFERENT DIRECTIONS

Starting can feel intimidating, but it doesn't have to be overwhelming – especially if you're looking 10 or more years down the road.

The team is well-versed in the intricacies and complexities of both the succession and acquisition journey, recognizing the unique issues and challenges involved – and why it's so important to tailor every service and solution to each individual business. Their primary goal is to help you create a tailored strategy and plan for your business's future.

Planning starts by focusing on the fundamental succession strategies and determining which one best fits your practice and time horizon, regardless of whether you want to develop a long-term or shorter-term plan.

PLANNING FOR YOUR TEAM AND YOUR EXIT

Your practice has distinct characteristics, so when you're seeking to realize the benefits of partnership you naturally want to ensure you find a complimentary match. Your ideal partnership might be one that's close and collaborative alongside a trusted colleague or part of a wider growth management plan.

When you're ready to exit your business or retire, it's just as important to have a plan in place to support your clients and professional legacy.

No matter your goals, the Succession & Acquisition Planning team can provide flexible guidance on team structure, role setting, compensation management and business continuity.

From simple transactions to guided transitions working alongside your chosen successor, the experienced Succession & Acquisition Planning team works closely with you to explore your options. Access to a suite of tools and resources equips you to estimate the value of your practice, connect with other advisors or make plans for your retirement.

Here's a friendly reminder...

THE BENEFITS OF SUCCESSION PLANNING



Builds long-term business value and expands your options, lowering the probability of finding yourself forced to accept a less favorable agreement.



Provides protection for your practice and family in case of your untimely death, incapacitation or disability.



Inspires confidence in your practice by planning for your clients' financial well-being and long-term goals.


THE FREEDOM TO TAKE CONTROL OF YOUR FUTURE

Rob Goff, vice president of Succession & Acquisition Planning, noted, "Since 2018, Raymond James has been surveying retired advisors to gauge their happiness and learn what factors influenced their answers. One common theme that emerges year after year is how essential succession planning is to satisfaction in retirement."

The same survey results indicate that 74% of retired advisors said clear client communication was a top factor in their retirement preparations. Effective succession planning hinges on strong relationships, much like your career as a financial advisor. In short, keeping clients informed and in the loop makes a positive difference.

In the most recent 2024 survey, over 90% of advisors are satisfied with retirement, with nearly half crediting the freedom to do what they want, whenever they want as a key reason.

Sources: "Want to retire happy from an advisory career? Start planning now" Rob Goff, InvestmentNews; "Take charge of your catastrophic plan" Joanna Bever, LinkedIn; "Catastrophic planning: The rules are clear, the risks are great" Keith Kopperud, LinkedIn

So, whether you're looking to strengthen your business to benefit your clients or focused on retirement planning, the Succession & Acquisition Planning team is here to help you navigate the complexities and realize the opportunities. It's never a bad time to help ensure a smooth transition and continued success for your practice. 

“One common theme that emerges year after year is how essential succession planning is to satisfaction in retirement.”

– **ROB GOFF**,
Vice president of Succession & Acquisition Planning

To help preserve the longevity of your practice while sustaining business growth, reach out to the Raymond James Succession & Acquisition Planning team. To get started, search **Succession & Acquisition Planning** on RJnet or visit raymondjames.com/advisor-opportunities.



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Branch happenings

A look around our footprint to see how your colleagues are putting our philosophy of “**work, work, play**” into action!



Share With Us

Submit photos and a short description of your branch happenings to TheCulture@raymondjames.com



CENTRAL DIVISION
SIOUX FALLS, SD

The Sioux Falls branch was a Premier sponsor and volunteered at the Avera Race Against Cancer.



CENTRAL DIVISION
CLIVE, IA

The Clive branch hosted a document shredding event where clients brought in donations for the Food Bank of Iowa, totaling 540 lbs of items.



CENTRAL DIVISION

DETROIT, MI



Van Hauswirth, Patrice Sinclair, Dominic Prioli, Rich O’Connell, Colleen Schon, Lewis Walterhouse, Alp Onder, April DeLange and Sue Bommarito purchased laptops for graduating seniors in the Rhonda Walker Foundation (RWF), which empowers teenage girls towards success. They also hosted an interviewing and job skills workshop and participated in the RWF Rise Up breakfast.



CENTRAL DIVISION

LOUISVILLE, KY

The Louisville branch conquered the beautification of the Big Brothers, Big Sisters grounds, filling an entire dumpster with clippings. Thanks to Heather Jones (and her brother), Burdette Park, Fraser Schaufele, Shane Calkin, Richard May and Chris Hirsch.



NORTHEAST DIVISION

CONSHOHOCKEN, PA

The Conshohocken branch participated in RJ Cares Month by partnering with the organization Cradles to Crayons, which provides children with essential items.



NORTHEAST DIVISION
ALLENTOWN, PA



The Allentown branch organized a clothing drive for Perfect Fit for RJ Cares Month. At the Perfect Fit for Working Women, a program of the YWCA Allentown, more than 500 women each year find the clothing and confidence necessary to start a job and build a career.



SOUTHEAST DIVISION
ATLANTA, GA



The Atlanta complex supported the American Lung Association Fight for Air Climb. There were hundreds of climbers, including firefighters from departments all over the state, from Fayette to Dawson counties. Raymond James was the top company fundraising with \$5,075 donated while two of the RJA climbers were awarded for being in the top three finishers in their age groups!



SOUTHEAST DIVISION ST. PETERSBURG, FL

The Carillon branch collected supplies for the Parc Center for Disabilities, the organization they supported for RJ Cares Month.



WESTERN DIVISION SAN FERNANDO VALLEY, CA

The Coast and Valley complex partnered with Heal the Ocean for a team beach cleanup.



WESTERN DIVISION SAN FRANCISCO, CA

During RJ Cares Month, the Alex. Brown San Francisco branch partnered with Family House San Francisco, which serves as a facility for families of children with life-threatening illnesses that provides physical and emotional support, free from financial concerns.



WESTERN DIVISION SHREVEPORT, LA

For RJ Cares month, the Shreveport branch purchased and packed snack packs for a local non-profit called Project Geaux Bags, which aims to make a child's first night in foster care easier.

NEW TO THE *Family*

It is our pleasure to introduce some of the newest members of the Raymond James family! Our most recent additions include world travelers, philanthropists and music enthusiasts. Read on to get to know them. If you see anyone with common interests or just want to say hello, feel free to reach out and welcome them to the family!

ALABAMA

WILLIAM FOCIA

Nickname: Billy
Branch city: Birmingham
Years in the business: 24
Previous Firm: Merit Financial
Fun fact: He enjoys golf, tennis and travel.

ARIZONA

GLENN A. PAHNKE

Branch city: Scottsdale
Years in the business: 37
Previous Firm: RBC
Fun fact: He loves to cook wild game.

HOWARD KERN

Branch city: Pasadena
Years in the business: 30
Previous Firm: UBS
Fun fact: He enjoys fly fishing, skiing and hiking.

PETER HENZIAK

Nickname: Pete
Branch city: Irvine
Years in the business: 26
Previous Firm: Merrill Lynch
Fun fact: He completed a full distance Iron Man race in 2022.

CALIFORNIA

CRAIG H. BARKER

Branch city: Roseville
Years in the business: 32
Previous Firm: Stifel
Fun fact: He is a model train enthusiast.

GHALIB KANJI

Nickname: G
Branch city: Beverly Hills
Years in the business: 28
Previous Firm: Morgan Stanley
Fun fact: He is originally from Kenya, and has lived in England and Canada.

ALASKA

JONATHAN COON

Nickname: Jon
Branch city: Palmer
Years in the business: 17
Previous Firm: Merrill Lynch
Fun fact: He served on a U.S. Navy submarine.

COLORADO

KATHERINE JANDA

Nickname: Katie
Branch city: Loveland
Years in the business: 18
Previous Firm: Morgan Stanley
Fun fact: She has a music minor and plays several instruments.

FLORIDA

CLAUDIO SIMOES

Branch city: Miami
 Years in the business: 40
 Previous Firm: Morgan Stanley
 Fun fact: He enjoys tennis, skiing and gardening.

RODRIGO NOVO DE OLIVEIRA

Branch city: Miami
 Years in the business: 26
 Previous Firm: Morgan Stanley
 Fun fact: He enjoys cooking, biking, fishing and travel.

GARY PERL

Branch city: Ponte Vedra
 Years in the business: 24
 Previous Firm: Morgan Stanley
 Fun fact: He put himself through college by working as an electrician.

EMMANUEL J. LELEKIS

Nickname: Manny
 Branch city: St. Petersburg
 Years in the business: 17
 Previous Firm: Wells Fargo
 Fun fact: He serves on the local and national advisory boards of the Salvation Army.

ANTHONY LOSH

Nickname: Tony
 Branch city: Stuart
 Years in the business: 26
 Previous Firm: Comerica Bank
 Fun fact: He enjoys collecting rare bourbon.

GEORGIA

RUSHTON ALLEN

Nickname: Russ
 Branch city: Albany
 Years in the business: 40
 Previous Firm: Morgan Stanley
 Fun fact: He serves on the board of the Albany Symphony, most recently as treasurer.

ILLINOIS

BENJAMIN MILLER

Nickname: Ben
 Branch city: Deer Park
 Years in the business: 26
 Previous Firm: UBS
 Fun fact: He is a trivia expert, able to quote books and movies he hasn't read or seen in years.

MICHAEL SCHODORF

Nickname: Schody
 Branch city: Chicago
 Years in the business: 30
 Previous Firm: UBS
 Fun fact: He won a Land Rover by getting a hole-in-one.

INDIANA

JACOB A. SCHMIDT

Nickname: Jake
 Branch city: Fort Wayne
 Years in the business: 43
 Previous Firm: R.W. Baird
 Fun fact: He practices the Russian martial art systema.

RICHARD HINESLY

Nickname: Rich
 Branch city: Greenwood
 Years in the business: 23
 Previous Firm: Huntington Financial Advisors
 Fun fact: He is a Chicago Bears season ticket holder.

KENTUCKY

JERRY TYLER

Branch city: Louisville
 Years in the business: 25
 Previous Firm: Merrill Lynch
 Fun fact: He went to 10 different schools before graduating high school.

LOUISIANA

HENRY A. ANDREWS

Branch city: Baton Rouge
Years in the business: 18
Previous Firm: J.P. Morgan
Fun fact: He can play a lot of Van Halen on guitar.

MICHIGAN

MICHAEL DEMPSEY

Nickname: Mike
Branch city: Farmington Hills
Years in the business: 13
Previous Firm: Wells Fargo
Fun fact: He loves to cook and grill.

PENNSYLVANIA

JOSEPH FLANNERY

Nickname: Joe
Branch city: Allentown
Years in the business: 5
Previous Firm: Quadrant Private Wealth
Fun fact: He is still incredibly close with friends he met in kindergarten.

MARYLAND

GREGORY J. DUNCAN-PETERS

Nickname: Greg
Branch city: Bethesda
Years in the business: 42
Previous Firm: Wells Fargo
Fun fact: He enjoys classic cars and fishing for bass and tarpon.

NEVADA

KERRY WITHROW

Nickname: The ESOP Guy
Branch city: Las Vegas
Years in the business: 31
Previous Firm: RBC
Fun fact: He enjoys travel, food, hiking, skiing and the outdoors.

SOUTH CAROLINA

DAVID C. JENSON

Branch city: Mt. Pleasant
Years in the business: 32
Previous Firm: Wells Fargo
Fun fact: He was formerly an attorney.

TEXAS

JOANNA D. KNIEBERG

Branch city: Frisco
Years in the business: 19
Previous Firm: J.P. Morgan
Fun fact: She has a black belt in American Karate.


HOMER RAMIREZ

Branch city: Frisco
Years in the business: 13
Previous Firm: J.P. Morgan
Fun fact: He's lived in Ontario, Canada, and Queensland, Australia.

OHIO

STACY MCVAN

Branch city: Dublin
Years in the business: 10
Previous Firm: Edward Jones
Fun fact: She was raised on a pig farm with over 10,000 hogs.



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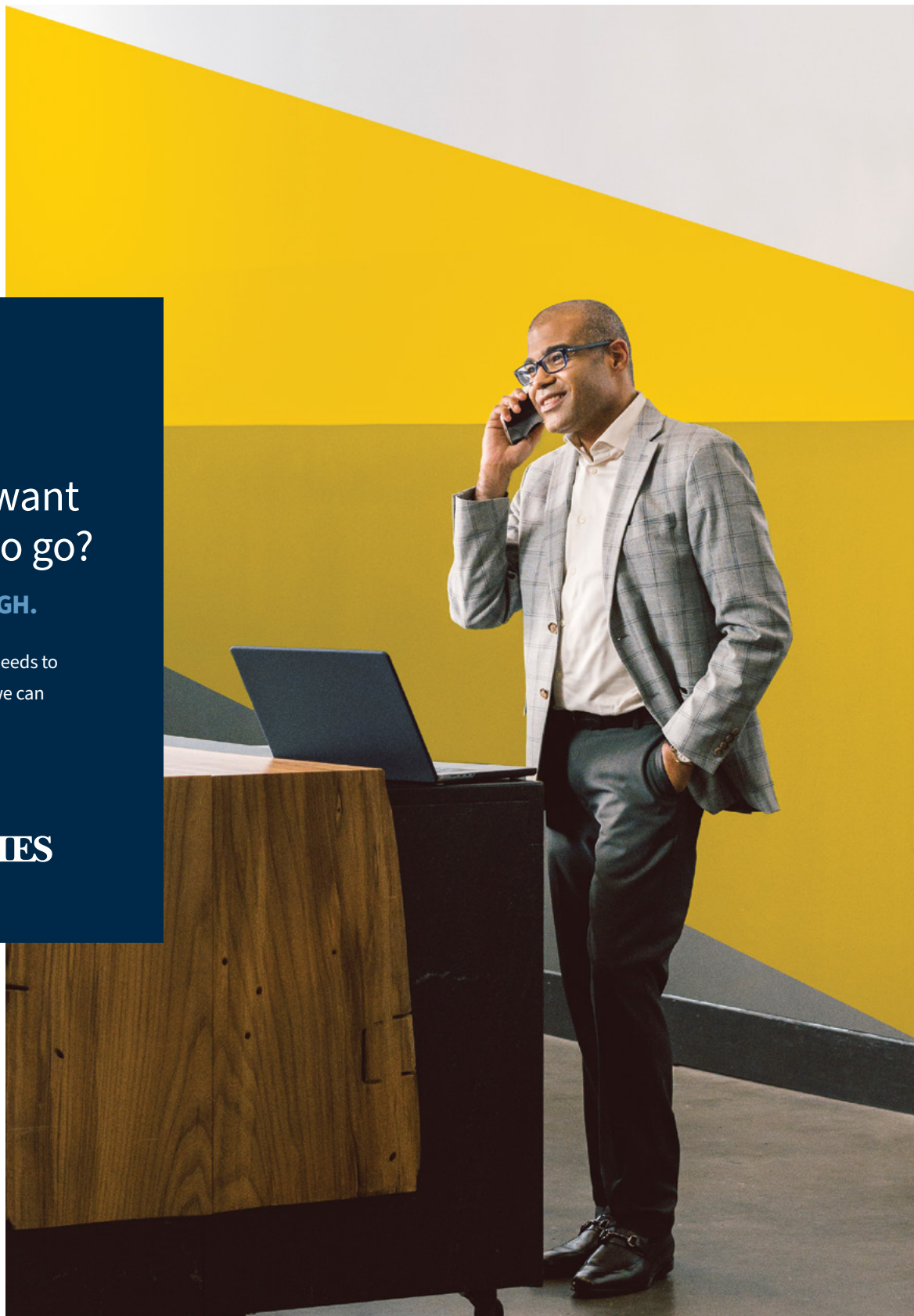
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