THE HISTORY OF RAYMOND JAMES

In 1962, Robert A. James Investments incorporates in St. Petersburg, Florida.

1962

1963

Profit sharing plan adopted for employees.

1964

First branch office opens.

Raymond and Associates merges into Robert A. James Investments, and the firm of Raymond James & Associates (RJ&A) is formed.

1965

Thomas A. James joins the firm.

1966

1967

Firm forms Investment Banking division.

Corporate headquarters moves to 8,000-sq.-ft. building.

1968

Floor brokerage and specialist operations begin on the Philadelphia Stock Exchange.

General insurance agency today known as Raymond James Insurance Group is formed.

1969

Raymond James Invitational Art Show debuts.

Raymond James Financial (RJF) incorporates as a holding company.

RJ&A completes its first successful public stock underwriting for ABA Industries.

1970

Tom James becomes CEO.

1971

Computers are introduced to improve operations efficiency.

1972

Equity Research department begins operations.

1973

Firm gains membership on the New York Stock Exchange.

Formal classroom training of associates begins, leading to the formation of Raymond James University.

1974

Investment Management & Research (IM&R) is founded as independent contractor broker/dealer.

Raymond James survives the worst bear market since the Great Depression.

1975

1976

Eagle Asset Management is formed.

1977

American Stock Exchange approves firm for membership.

RJ Oil & Gas subsidiary incorporates as general partner for oil and gas limited partnerships.

1978

1979

1980

Robert Thomas Securities subsidiary forms as independent contractor broker/dealer.

Net income exceeds $1 million for the first time.

RJ Properties subsidiary forms as real estate general partner.

1981

Correspondent clearing services to independent broker/dealers are introduced.

1982

Firm moves to new 85,000-sq.-ft. corporate headquarters.

RJ Leasing subsidiary forms as general partner for equipment leasing limited partnerships.

1983

Firm completes $14 million initial public offering.

1984

1985

NYSE

New York Stock Exchange approves Raymond James stock for listing (symbol: RJF).

Firm pays first dividend.

Raymond James Limited Partnership Trading Desk organizes.

1986

Raymond James completes secondary offering of stock.

Firm organizes Public Finance department.

1987

Firm moves to 15-acre Raymond James Financial campus and constructs a 180,000-sq.-ft. building.

1988

Firm initiates Stock Loan/ Stock Borrow department.

1989

Research and asset allocation results begin appearing in *The Wall Street Journal*.

1990

Our corporate culture commitment to client service formalizes under the name Service 1st.™

1991

1992

Raymond James Trust Company subsidiary is formed.

Corporate campus expands into a second 120,000-sq.-ft. building.

1993

1994

Initial publication of our Client Bill of Rights.

Raymond James Bank subsidiary organizes.

1995

1996

Clients gain access to their account information on raymondjames.com.

1997

Raymond James International Holdings, Inc. founded.

Raymond James Capital, our merchant bank, is organized as a subsidiary.

1998

Naming rights purchased to Tampa's Raymond James Stadium®.

300,000-sq.-ft. Tower 3 and Raymond James Bank and Trust Company buildings completed.

Raymond James Bank completes nationwide introduction of residential lending products.

1999

Detroit-based regional broker/dealer Roney & Co. is acquired.

Online trading offered to clients through their financial advisors.

Our independent contractor subsidiaries Investment Management & Research (IM&R) and Robert Thomas Securities merge to form Raymond James Financial Services.

2000

Online banking introduced by Raymond James Bank.

2001

Raymond James Stadium hosts Super Bowl XXXV.

Firm named to the Fortune 1000 for the first time.

Alternative Investments Group created.

2002

FORTUNE

Raymond James named to the *Fortune* 1000 Most Admired Company list for the first time.

2003

Firm wins national Business in the Arts award.

2004

Michigan-based personnel relocate to the 38,000-sq.-ft. Southfield location.

Total assets within Raymond James Bank surpass $1 billion.

Raymond James Tax Credit Funds cumulatively exceed $1 billion in equity raised.

2005

300,000-sq.-ft. Tower 4 at the Raymond James Financial Center is completed.

Gov. Jeb Bush and Florida Cabinet recognize Tom James as the 2004 Florida Free Enterpriser of the Year.

2006

Tom James is elected chairman of the Financial Services Roundtable, and chairman-elect of the Florida Council of 100.

2007

Firm establishes its Wealth Solutions department to more efficiently serve advisors and high-net-worth clients.

2008

Firm named best in *SmartMoney*'s annual America's Best and Worst broker survey.

Raymond James Stadium hosts Super Bowl XLIII.

Heritage Family of Funds group rebrands as the Eagle Family of Funds.

Tom James named National Entrepreneur of the Year in the financial services category by Ernst & Young.

Forbes.com names firm one of America's Most Trustworthy Companies and One of America's Best Big Companies.

J.D. Power and Associates ranks firm highest in both investor satisfaction and employee advisor satisfaction.

2009

2010

Paul Reilly succeeds Tom James as CEO. Tom remains executive chairman of the board.

Life Well Planned, the firm's new advertising campaign, is launched in print, broadcast and online.

LIFE WELL PLANNED.

2011

Firm reports record annual net revenues of $3.33 billion.

2012

100

Raymond James achieves its 100th consecutive quarter (25 years) of profitability.

2013

FOR 50 YEARS 2013

Firm celebrates 50th anniversary.

Firm acquires Morgan Keegan to become one of the largest U.S. wealth management and investment banking firms not headquartered on Wall Street.

RAYMOND JAMES®