



Assistant to the Chair Program

There's no better place to begin your post-MBA career than at the top.

A unique and exciting opportunity awaits a select group of MBA recipients at one of the nation's top financial services firms. The Raymond James Assistant to the Chair Program offers high-performing, self-motivated individuals the opportunity to acquire and hone the management and leadership skills necessary to succeed at the highest levels of the firm.

ABOUT THE PROGRAM

Established in 1991, assistants to the chair initially worked exclusively with Thomas A. James, then-chair and CEO of Raymond James, leading special projects that shaped the firm's strategy, business development and ongoing success. Since Paul Reilly took the helm as CEO in 2010, the mission of the role has broadened to support other members of the Executive Committee in addition to the chair and CEO.

Over the course of our two-year program, assistants to the chair learn from some of the most respected minds in the financial services industry and regularly participate in meetings of the board of directors and other senior-level management sessions.

A LETTER FROM OUR CHAIR AND CEO

Congratulations! As you prepare to complete your MBA, your diligent work has put you in a position to assess your career options. If you have an interest in management within the financial services industry and want to gain firsthand, top-of-the-house perspective from leaders in the industry, we invite you to consider our Assistant to the Chair Program, established in 1991 to help recruit exceptionally talented MBA graduates from top schools across the country. Assistants to the chair work directly for us and other members of Raymond James' senior management on strategic projects that drive our company's ongoing success. Our program has been quite successful, producing a number of senior leaders throughout the organization. We hope you consider Raymond James as the place to productively employ your education, skills and energy.



Thomas A. James

TOM JAMES
Chair Emeritus



Paul C. Reilly

PAUL REILLY
Chair, Chief Executive Officer

As a program participant, your responsibilities will include:

- ▶ Collaborating with the executive management team on strategic initiatives, including merger and acquisition opportunities, new product evaluations, operational improvements and contingency planning
- ▶ Presenting analyses and recommendations to the senior management team and directing the transition of approved recommendations into implementation
- ▶ Developing in-depth knowledge of all aspects of the financial services industry, including capital markets, brokerage, asset management, and retail and commercial banking

FOLLOW-ON OPPORTUNITIES FOR PAST ASSISTANTS TO THE CHAIR

Past participants have consistently attained high-level positions across the firm. Former assistants to the chair currently hold the following positions within Raymond James:

- ▶ Chief Operating Officer, RJF; President, Asset Management Group (Wharton '91)
- ▶ Chief Marketing Officer & Director of Strategic Planning (Booth '98)
- ▶ Managing Director, International Institutional Sales (Texas '03)
- ▶ Chief Risk Officer – Private Client Group & Asset Management (Kellogg '07)
- ▶ Chief Risk Officer – Raymond James Bank & Trust (HBS '08)
- ▶ SVP, Head of Financial Institutions Division (Texas '08)
- ▶ SVP, RJA Regional Director (Booth '09)
- ▶ Chief Financial Officer (Columbia '10)
- ▶ Managing Director, Investment Banking (Kellogg '11)
- ▶ President, Scout Investments (Columbia '12)
- ▶ DIR, Investment Banking (UVA Darden '12)
- ▶ VP, Strategic Accounts – Investment Banking (Kellogg '13)
- ▶ VP, Corporate Risk Management – Products (Booth '14)
- ▶ VP, Head of Product – Carillon Tower Advisers (Stern '14)
- ▶ VP, Asset Management Technology & Operations (UVA Darden '16)
- ▶ VP, Capital Planning and Financial Analysis – CTA (Columbia '16)
- ▶ VP, Strategic Initiatives – Private Client Group (Kellogg '17)
- ▶ VP, Strategic Operations (Booth '18)
- ▶ VP, Corporate Development (Texas '18)
- ▶ VP, Private Institutional Clients – Cross Asset Solutions (Columbia '19)

IDEAL CANDIDATES

In addition to completing an MBA at a qualified institution, ideal candidates for our Assistant to the Chair Program should have the following attributes:

- ▶ Exceptional analytical, quantitative and critical thinking skills
- ▶ Motivated and independent self-starter
- ▶ Strong interest in the financial services industry

“The assistant to the chair role provided me with an invaluable set of experiences, including interesting interdisciplinary assignments across most of the business units of a well-managed, international, diversified financial services company. In some ways, the role also served as a ‘real-life extension’ of my MBA studies, providing a firsthand view of our senior executives’ management, planning and decision-making processes.”

**MIKE WHITE**

*Booth '98
Chief Marketing Officer &
Director of Strategic Planning*

ABOUT RAYMOND JAMES

Founded in 1962, a public company since 1983 and in the S&P 500 since 2017, Raymond James is a diversified financial services holding company with subsidiaries engaged primarily in investment and financial planning, in addition to investment banking and asset management. Our stock is traded on the New York Stock Exchange (RJF).

Through its three broker/dealer subsidiaries, Raymond James Financial has more than 8,600 financial advisors serving throughout the United States, Canada and overseas. In addition, total client assets are approximately \$1.13 trillion.*

Raymond James has been recognized nationally for its community support and corporate philanthropy. The company has been ranked as one of the best in the country in customer service, as a great place to work and as a national leader in support of the arts.

*As of 6/30/2022. Past performance is not indicative of future results.

TO LEARN MORE ABOUT THE ASSISTANT TO THE CHAIR PROGRAM OR TO APPLY, VISIT RAYMONDJAMES.COM/A2C.

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER

880 CARILLON PARKWAY // ST. PETERSBURG, FL 33716 // TOLL-FREE: 800.248.8863 // RAYMONDJAMES.COM/CAREERS