

Kim Jenson appointed Raymond James Wealth Management and Charles Stanley interim CEO

LONDON; TUESDAY 15 April 2025, 12:00 BST: Raymond James Wealth Management (RJWM) and Charles Stanley & Co. (CSC) today announces that Kim Jenson is appointed interim CEO, subject to regulatory approval, following CEO Paul Abberley stepping down.

Kim will assume immediate responsibility for overseeing the Raymond James UK wealth management business while an external search for a permanent CEO is underway. Peter Moores remains CEO of Raymond James Investment Services (RJIS).

Kim joins from Raymond James Financial, Inc. in the US where she was Chief Operating Officer for Raymond James' US Private Client Group, a business with over \$1.5 trillion in assets under administration that supports more than 1.5 million clients. Kim has relocated to the UK as part of her new role.

She brings with her over 40 years of experience in addition to her eight-year tenure at Raymond James.

Prior to joining Raymond James, Kim Jenson was a managing director in UBS Wealth Management Americas Chicago market, where she was responsible for market leadership, business development, recruitment and risk management. She previously served as the firm's chief of staff for the CEO and began her career there as a divisional director. Ms. Jenson also spent 15 years at Piper Jaffray (now Piper Sandler) in Minneapolis and was a member of the private client business executive committee.

Sandy Kinney Pritchard, RJWM, CSC and RJIS Board of Directors Chair, said:

"The Board is delighted to be able to call on a leader with Kim's track record and client-focused leadership as we continue the integration of the two businesses. Kim has a wealth of experience in managing complex business integrations, as well as a deep understanding of Raymond James' business and a proven track record in delivering for clients."

"Paul has been instrumental in laying the foundation for a successful integration. We are grateful for Paul's 11 years of significant contribution to Charles Stanley and Raymond James Wealth Management, and his commitment to innovation in client propositions and service provision."

Raymond James Financial, Inc., Executive Chair, Paul Reilly added:

"Kim's industry experience and deep knowledge of our business is exceptional, and she has earned a reputation for her client focus, as well as her thoughtful and impactful leadership. Working with the Board and our collective UK leadership team, I am confident in our ability to seize the tremendous potential of the combined Raymond James and Charles Stanley businesses."

"I am extremely proud of what our leadership team and all our staff have accomplished as we bring together the two firms," said Paul Abberley. "It is clear that the work will continue in good hands with Kim's transitional leadership and the strong foundation and team we have in place."

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About Raymond James Wealth Management (RJWM)

RJWM comprises Raymond James Investment Services (RJIS) and Charles Stanley & Co. (CSC). Assets under management and administration (AUMA) of the combined UK wealth management group stands at £40bn. RJWM is part of the wider Raymond James Group - a US-based international financial services powerhouse with over \$1.5 trillion assets under management.

About Raymond James

Raymond James Investment Services Limited has been offering trusted advice and personalised wealth management solutions in the UK since 2001. Our parent company, Raymond James Financial, Inc. has been doing the same in the US for over six decades. With more than 300 wealth managers, we now have over 50,000 client accounts and look after more than £18.18 billion in client assets in the UK.

We provide tailored investment management and financial advice to individuals and their families. We also provide investment management services to charities. As part of the core Private Client Group of Raymond James Financial, Inc., we benefit from the size and scope of a well-established, profitable and diversified financial services firm. To find out more, go to the [Raymond James UK website](#).

Our parent company

Founded in 1962 and a public company since 1983, Raymond James Financial Inc is a diversified financial services company, headquartered in Florida, USA.

Raymond James currently works with over 8,700 wealth managers located in the US, Canada and the UK. These wealth managers service accounts representing total assets of approximately \$1.57tn.

On 31 December 2024 RJF announced 148 consecutive quarters of profitability. This milestone is a reflection of our parent company's long-term vision and conservative business approach, as well as a testament to RJF's strength and stability.