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## **Raymond James and Conquest Planning Join Forces to Empower Canadian Investors with Personalized Advice**

*The strategic partnership harnesses cutting-edge technology and artificial intelligence to deliver hyper-personalized financial solutions, deepening client relationships for advisors across Canada*

TORONTO – September 12, 2024 – [Raymond James Ltd.](#), the Canadian arm of North American investment dealer Raymond James Financial Inc., and [Conquest Planning Inc.](#) (“Conquest”), a technology platform modernizing financial planning with customized and convenient advice, today announced a partnership to improve the client planning experience for Raymond James-affiliated advisors. This partnership will help advisors personalize the advice experience in alignment with Raymond James aim to deliver a holistic approach to managing wealth, addressing various aspects of clients' financial lives through a combination of strategic planning, investment strategies and tailored solutions.

By integrating Conquest's artificial intelligence (AI)-powered financial planning platform, Raymond James advisors can develop hyper-personalized strategies for clients. This collaboration enables precise scenario analysis, goal-based planning and real-time adjustments, enhancing the overall client experience. Partnering with Conquest supports Raymond James' commitment to comprehensive wealth management by providing deeper insights, improved client engagement and more tailored financial advice.

“Conquest’s comprehensive and thorough client discovery process is designed to provide a highly personalized, client-driven solution that’s unique to each individual and family we serve,” said [Michelle Connolly](#), **Head of Financial Planning and Insurance at Raymond James**. “By actively involving clients in the development of their financial strategies alongside their advisory team, Conquest’s technology encourages greater engagement and buy-in. This collaborative approach significantly enhances our advisors’ ability to increase the end client’s potential for long-term financial success.”

With access to Conquest’s AI-powered platform, specifically its Strategic Advice Manager (SAM), Raymond James' corporate planning and advisory teams, along with associated wealth planners, can help clients better understand how their decisions impact their overall financial plans. SAM’s proprietary algorithm uses client-specific data to propose and rank strategies based on the client's unique financial situation and provide a more dynamic planning experience. Further enhancing interactivity, SAM offers clear recommendations that show the potential impact of each decision on individual goals and the broader financial plan.

"At Raymond James, helping Canadian investors achieve their financial goals is a key aspect of our client-centric approach and a cornerstone of our firm's success. Our Service 1st<sup>SM</sup> philosophy emphasizes that putting clients’ needs first is the best way to ensure their success, which in turn drives the long-term success of our advisors and the company. Conquest’s tools will further empower our advisors to engage clients more deeply in the financial planning process and enable them to track their progress towards

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these goals,” added [Jennifer Hodgson](#) SVP, Head of Wealth Solutions, RJL and CEO, Solus Trust Company/Raymond James Trust (Québec) Ltd.

Conquest’s software is designed to adapt to clients’ changing life circumstances, objectives, priorities and risk tolerances. This adaptability helps ensure that advice remains relevant and effective as clients’ needs evolve. With Conquest, advisors can deliver 'smart' advice directly to clients through a simplified interface that includes embedded, in-context financial literacy information.

“Through this collaboration, Conquest and Raymond James will provide more investors across Canada with personalized, expert guidance to help them achieve financial success,” said [Brad Joudrie](#), Chief Revenue Officer at Conquest. “Our shared commitment to empowering consumers ensures Canadians are better equipped to navigate life's uncertainties with confidence and reach their financial aspirations.”

For more information about Conquest’s intuitive and innovative financial planning software solution, please visit [conquestplanning.com](http://conquestplanning.com). Additional context on Raymond James Ltd.’s values, mission and pledge can be found at [raymondjames.ca](http://raymondjames.ca).

## **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 8,800 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 \$1.48 trillion in client assets under administration. For more information, please visit [www.raymondjames.ca](http://www.raymondjames.ca).

## **About Conquest Planning**

[Conquest Planning](#) is Canada’s leading financial planning software company with a purpose-driven approach to delivering financial advice. The product-led company is built on the foundational belief that every single person deserves access to great financial advice. Users of Conquest Planning leverage its intuitively designed product, simple onboarding process, and data-driven artificial intelligence to accelerate the delivery of beautifully designed, hyper-personalized financial plans. Established in 2018, Conquest Planning was founded by a team of financial technology veterans whose track record of success spans over 30 years in the financial planning software space. For more information, follow Conquest on [Twitter](#), [LinkedIn](#) and [Facebook](#).

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## **Media Contacts:**

Raymond James Ltd.

Chris Cooksey

Senior Manager, Corporate Communications

416-777-7089

[chris.cooksey@raymondjames.ca](mailto:chris.cooksey@raymondjames.ca)

Conquest

StreetCred PR

[conquest@streetcredpr.com](mailto:conquest@streetcredpr.com)

Will Ruben

847-208-8289

[william@streetcredpr.com](mailto:william@streetcredpr.com)

Meaghan McNichol

412-720-3777

[meaghan@streetcredpr.com](mailto:meaghan@streetcredpr.com)