

Raymond James and Buduchnist Credit Union Wealth Management announce platform partnership

Toronto, September 10, 2018 – Raymond James Ltd., the Canadian arm of North American investment dealer Raymond James Financial, Inc. and BCU Wealth Management, the investment and financial planning arm of the Buduchnist Credit Union, are pleased to announce their new partnership. Wealth Manager Max Trojan and his team, including Associate Financial Advisors Andrew Ostapchuk and Damian Snih, will now be able to support their clients by leveraging the Raymond James wealth management platform.

David Burnes, Senior Vice President, Raymond James Correspondent Services, said, “Partnering with BCU marks an important step for Raymond James in expanding our affiliation options in Canada to include financial institutions, such as BCU and their members. We are excited to share our proven platform with BCU members and deliver the products and services that enhance their wealth management options.”

“We are excited about our new partnership with Raymond James,” said Max Trojan. “The firm’s conservative financial management, historical profitability, research, as well as its client-centric culture, makes Raymond James a natural fit to meet our clients’ needs and provide a wider range of resources. This new partnership with Raymond James will allow BCU Wealth Management to offer our clients comprehensive, market-leading, wealth management solutions.”

About Raymond James

Raymond James is a leading North American independent full service investment dealer offering an extensive range of professional investment services and products, including: private client services, financial and estate planning services, portfolio management, insurance, equity research, investment banking, and institutional sales and trading. Through its network of approximately 7,700 financial advisors across Canada, the United States and key international centres, Raymond James serves individual clients and families across more than three million accounts and manages more than US\$754 billion in client assets under administration. For more information about Raymond James, please visit our web site at: www.raymondjames.ca.

About BCU Wealth Management

BCU Wealth Management is a full-service boutique investment firm that creates customized financial planning solutions for individuals, families, businesses, foundations, trusts, and non-profit organizations. It was launched in 2002 as a separate investment arm of BCU Financial Group to offer comprehensive financial advice including financial planning, retirement planning, education planning, and estate planning, and various other investment solutions.

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