

22 January 2018,

FOR IMMEDIATE RELEASE

BLOOMSBURY WEALTH IS CERTIFIED FOR INVESTMENT ADVISER FIDUCIARY EXCELLENCE

London, UK – Bloomsbury Wealth, a London-based branch of Raymond James Investment Services Ltd, has become one of only three UK wealth management practices to be awarded a CEFEX standard for fiduciary distinction.

CEFEX, the Centre for Fiduciary Excellence, LLC, is an Fi360 company which assesses firms' adherence to industry standards. Bloomsbury Wealth was certified against the "Prudent Practices for Investment Advisers" standard, which relates to how investment advisory firms assume responsibility for managing a client's overall investment management process including the selection, monitoring and de-selection of investment managers, and the development of processes to implement investment strategies and fiduciary practices on an ongoing basis.

The certification is a sign of Bloomsbury's market-leading excellence in the area. Bloomsbury is joining an elite group of investment advisers across the globe who have successfully completed the independent certification process.

Carlos Panksep, General Manager, CEFEX, said: "Through CEFEX's independent assessment, the certification provides assurance to investors that Bloomsbury Wealth has demonstrated adherence to the industry's best fiduciary practices. This indicates that their interests are aligned with those of investors."

Robert Lockie, one of the Branch Principals at Bloomsbury Wealth, added: "We are delighted to have achieved the CEFEX certification as it demonstrates that we have met an independently verified standard that has so far been awarded to only two other UK firms. It is a welcome recognition after the years of hard work put in by all members of our team to deliver a high standard of service to our clients that we do what we have always said we do."

Bloomsbury Wealth has been certified for investment advisory services for high net worth clients engaged in systematic investment strategies. Bloomsbury Wealth is registered at www.cefex.org, where its certificate can also be viewed.

A full copy of the certification standard can be downloaded from CEFEX at www.cefex.org and a summary can be viewed by clicking on Bloomsbury Wealth's on-line CEFEX certificate. More information is available at www.bloomsburywealth.co.uk.

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Notes to the Editors

About Bloomsbury Wealth and Raymond James Investment Services Limited (Raymond James)

Bloomsbury Wealth specialises in the provision of financial planning and wealth management and is based in the City of London. It operates as a commercially independent branch of Raymond James Investment Services Limited.

Raymond James was founded to service and support entrepreneurial investment managers and investment focused financial planners in the UK who run growth orientated practices with a strong management and compliance culture. These wealth managers service high net worth clients with complex financial needs.

Our services are delivered in an open architecture environment so that wealth managers select the products and solutions that meet their clients' specific needs in the most cost-effective manner. Furthermore, Raymond James does not centrally manufacture and promote any proprietary investment products in the UK, ensuring there is no conflict to the wealth manager's unbiased investment selection.

Raymond James offers three business models, including Independent Contracting, Professional Partner and the Investment Management Platform. In our first two models, Raymond James provides the regulatory umbrella, which means it can help individuals establish their own boutique wealth management/investment management practice, with the individuals authorised with the FCA through Raymond James. The Investment Management Platform provides a platform of services for firms already authorised with the FCA. Wealth managers can move between business models as their needs evolve and in all cases, the wealth managers run commercially independent practices.

See www.RaymondJames.uk.com or www.BloomsburyWealth.co.uk for further information. The press release can also be found here: <https://www.raymondjames.uk.com/press-release/>

Bloomsbury and Bloomsbury Wealth are trade names of Raymond James Investment Services Limited (Raymond James) utilised under exclusive sub-licence.

Raymond James is a member of the London Stock Exchange and is authorised and regulated by the Financial Conduct Authority. Its Registered Office is at Broadwalk House, 5 Appold Street, London EC2A 2AG. Registered in England and Wales No. 3779657.

About CEFEX:

CEFEX, Centre for Fiduciary Excellence, LLC, a Fi360 company, is an independent certification organisation. CEFEX works closely with industry experts to provide comprehensive assessment programs to improve the fiduciary practices of investment stewards, advisers, recordkeepers, administrators and managers.

CEFEX conducts assessments according to the principles of the international standard ISO/IEC 17021.

Observance of these principles is intended to ensure that CEFEX operates in a competent, consistent and impartial manner, thereby facilitating the recognition of CEFEX and the acceptance of its certifications on a national and international basis. The ISO 17021 standard serves as a foundation for facilitating the recognition of CEFEX certification in the interests of national and international trade.

Certification provides independent demonstration that the management system of the organization:

- conforms to specified requirements described within a standard,
- is capable of consistently achieving its stated policy and objectives, and
- is effectively implemented.

The assessment thereby provides value to the organization, its customers and interested parties. The overall aim of certification is to give confidence to all parties that a management system fulfils specified requirements. The value of certification is the degree of public confidence and trust that is established through an impartial and competent assessment by a third-party. Parties that have an interest in certification include, but are not limited to:

- Certification bodies,
- The customers of the certified organizations,
- Governmental authorities,
- Self-regulatory organizations, and

- Consumers and other members of the public

About Fi360:

Fi360's mission is to help institutions and advisers gather, grow, and protect assets through better investment and business decision-making. Fi360's capabilities include professional development, software applications, and research and practice management. Fi360 is the home of the AIF® designation and the Fi360 Toolkit®, and is the parent company of Ann Schleck & Co., CEFEX, and IPS AdvisorPro. For more information about Fi360, please visit www.fi360.com.