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## FINANCIAL ADVISOR DANIEL ROLAND APPOINTED TO RAYMOND JAMES' SUSTAINABLE INVESTING ADVISORY COUNCIL

ST. PETERSBURG, Fla. – Daniel Roland, CIMA®, AIFA®, Managing Director, has been appointed to the Raymond James Sustainable Investing Advisory Council (“the council”), according to Samantha Trebesch, Vice President of Strategic Initiatives at Raymond James and council chair. Raymond James’



*Daniel Roland*

approach to sustainable investing is collaborative in nature across all business segments and heavily influenced by advisor feedback, including the council, which is comprised of a select group of 16 financial advisors across the firm’s affiliation models. Established in 2018, the council’s mission is to continue to enhance the firm’s sustainable investing capabilities and resources made available to the firm’s approximately 8,200 advisors and their clients, according to Kim Jenson, Chief Operating Officer of Raymond James’ Private Client Group and executive sponsor of the firm’s sustainable investing initiatives.

“Positive asset flows continue to reinforce growing interest in sustainable investing, providing our advisors the opportunity to further engage our high-net-worth clients in deeper relationships through impact investing, tying to their philanthropic efforts, and engaging the next generation in the wealth transfer through meaningful conversation around values and legacy building,” said Jenson at the council’s February 2021 meeting.

“We’re very pleased with the progress of the council to date in advancing our sustainable investing insights and platform, namely expanding choice to advisors and clients in building positive impact through their portfolios,” Trebesch added. “We’re excited to welcome Daniel Roland, who brings a wealth of sustainable investing experience with institutional investors and a unique perspective working with clients impacted by climate change.”

“I’m honored to be selected to serve on the firm’s sustainable investing council,” said Roland. “Many clients are increasingly more interested on how the investments they make impact the world around them, and Raymond James’ thoughtful collection of valuable resources has assisted me in helping address this important aspect in my clients’ financial plans. I’m thrilled to join this group of forward-thinking advisors as we help shape a platform that can make real-world differences to our clients.”

Raymond James advisors have access to a variety of sustainable investing vehicles and resources to fit their clients’ needs, including professional managed portfolios, individual equities and bonds, funds, green bonds, and alternative investments. For more information, visit <https://www.raymondjames.com/commentary-and-insights/sustainable-investing-resources>.

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