

## A 200-Year Tradition of Sophisticated Wealth Management Has a Home in San Francisco

LED BY REGIONAL EXECUTIVE JENNIFER BOTTALICO AND ANCHORED BY A GROWING TEAM OF CLIENT ADVISORS, THE SAN FRANCISCO OFFICE OF ALEX. BROWN, A DIVISION OF RAYMOND JAMES, GIVES DEEP LOCAL ROOTS TO A FIRM WITH A RENOWNED FINANCIAL LEGACY SPANNING OVER TWO CENTURIES.

Clients dedicate years to building their wealth, which is why they deserve an experienced team dedicated to assisting them with all of the essential matters money touches—and that’s exactly what you’ll find at the San Francisco office of Alex. Brown.

Regional Executive Jennifer Bottalico and her team offer quality wealth management paired with Alex. Brown’s boutique nature and the powerful resources of a renowned financial firm. Advisors and clients can expect an elevated offering and atmosphere underpinned by the resources and support of an international leader.

Known as the nation’s first investment bank, Alex. Brown has served as a symbol of sophisticated wealth management since its founding in 1800. It’s also been recognized as the home of elite client advisors seeking to fulfill the needs of distinctive clients through a platform founded on institutional strength and intuitive adaptability.

Alex. Brown experienced a resurgence in 2016 by joining forces with Raymond James, an international financial firm known for its client-first values and inviting culture of independence. Moving forward, the San Francisco office is proud to continue cultivating a legacy of excellence that’s been 200 years in the making.

“We are fortunate to have an office that is very collaborative by nature, and we believe that leveraging experience and expertise is part of our firm’s signature approach that enables us to solve the most complex client needs. I feel honored to be surrounded by



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JENNIFER BOTTALICO, REGIONAL EXECUTIVE

such an insightful, knowledgeable team of professionals,” says Jennifer, who is devoted to continue growing their presence on the West Coast.

The majority of advisors, including the management team and many on the sales team, have spent their entire careers with Alex. Brown. Jennifer herself joined Alex. Brown in 1994 in Baltimore—where Alex. Brown began—and moved to San Francisco in 1999.

“When I first moved here, it was a very transaction-driven business. Over time, it’s changed into a more diversified business focused on servicing families, family offices, and entrepreneurs, as well as on our ability to deliver access to a world-class suite of investment and financial planning products designed to meet our clients’ needs with precision and versatility. Our office feels really proud about where we work now and what we can offer to our advisors and clients,” says Jennifer.

The San Francisco office values its commitment to the community and recently collaborated with Larkin Street Youth, San Francisco’s largest nonprofit for young

homeless people. The other organizations the office supports include Buckelew Counseling Services, which focuses on mental health recovery and wellness; the Military and Veterans Appreciation Trust Foundation; and Guide Dogs for the Blind.

As Alex. Brown continues expanding its presence across the country, building on two centuries of exceptional service, Jennifer and her team look forward to keeping their roots firmly planted while exploring the limitless potential for growth that the Alex. Brown San Francisco office has to offer.

**ALEX. BROWN**

A DIVISION OF **RAYMOND JAMES**

The San Francisco office of Alex. Brown is located at 101 California Street, Suite 4500, San Francisco, CA 94111

For more information, call **415-645-6455** or visit **[alexbrown.com/san-francisco](http://alexbrown.com/san-francisco)**.