

Biography of Bert Boksen



A luminary in the financial services industry, Bert Boksen's name is synonymous with integrity, commitment, and expertise. Born in New York City on March 27, 1948, his journey from the hustle and bustle of the Big Apple to the serene shores of Florida is as captivating as his professional ascent. Today, after an illustrious 44-year tenure at Raymond James, he enjoys a well-deserved retirement surrounded by his loving family, which includes three children and four grandchildren.

Current Role

Embracing Retirement

While he has recently retired, his legacy as a portfolio manager in the financial services industry, particularly at Raymond James, endures. His profound expertise in small-cap stocks has charted many success stories, and even in retirement, he remains a revered figure, frequently sought after for his wisdom and guidance.

Career History

From New York City to Florida: Four Decades at Raymond James

his professional trajectory began in New York City, the global epicenter of finance. However, in 1979, a pivotal move to Florida marked a new chapter in his life. Over the next 44 years, he became an integral part of Raymond James. His nuanced understanding of small-cap stocks made him an invaluable asset, guiding numerous portfolios to prosperity.

Academic Background

Building a Strong Foundation



Bert Boksen

While Bert Boksen has recently retired, his legacy as a portfolio manager in the financial services industry, particularly at Raymond James, endures.

His intellectual foundation was laid at the City College of New York, an institution recognized for its rigorous academic curriculum and role in shaping industry leaders. His academic pursuits continued. He further enriched his knowledge base at St. John's University, ensuring he was well-equipped to navigate the complex world of financial services.

Philanthropy and Charity

Heartfelt Contributions to Society

Beyond the boardrooms and stock exchanges, Bert has a deep-seated commitment to philanthropy. His association with the Mayo Clinic as a distinguished benefactor speaks volumes of his dedication to healthcare advancements. As a long-term United Way Tocqueville Club member, he has consistently championed community-driven initiatives, making significant contributions to societal well-being.

Education remains close to his heart, evident from his generous contributions to St. John's University and the Academy of St. Petersburg. Moreover, his support for the Holocaust Museum underscores his belief in preserving historical narratives, ensuring future generations remember and learn from the past.



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Personal Life and Interests

Family, Sports, and Strategy

While his professional life is a testament to his dedication and hard work, his personal life narrates a tale of love, resilience, and passion. Having experienced the ebbs and flows of life, including a divorce and a subsequent remarriage, his family remains his anchor. With three children and four grandchildren, he is surrounded by love and joy, making his post-retirement days even more fulfilling.

An avid tennis player, his love for the sport reflects his zest for life and his competitive spirit. On the other hand, his affinity for chess mirrors his strategic mindset, honed over years of managing portfolios and making high-stakes decisions.



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Bert Boksen's biography paints a portrait of a multifaceted individual. From his early days in New York City to his significant contributions at Raymond James in Florida, his life is a blend of professional excellence, personal resilience, and a deep commitment to society. Today, as he revels in the joys of family and enthusiastically pursues his hobbies, he remains an inspiration for many, a beacon of dedication, perseverance, and generosity.