

Stifel Access Enhancements

New features, functionality, and enhancements have been added to Stifel Access!

July 13, 2016

Projected Monthly Income Page

A new graphical element has been added to the top of the projected monthly income page

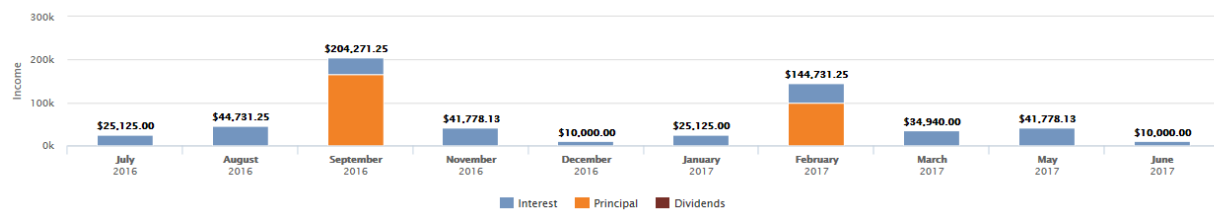
Detailed information regarding the Projected Monthly Income Page includes:

The values of each income type (Interest, Principal and Dividends) displayed as a bar above each month.

Projected Income

print Messages

12345678 - Advantage Account 2



Feature Dock

Feature Dock gives the user a snap shot of the current indexes and allows users to search for quotes

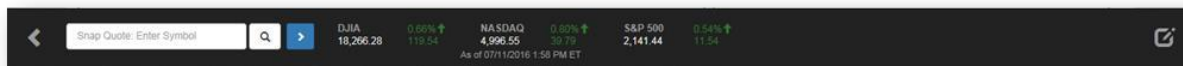
Detailed information on the Feature Dock includes:

LEFT ARROW

The left arrow allows the ability to expand or collapse the Snap Quote bar.

EDIT DOCK

The edit dock allows you to rearrange the layout of Snap Quote to your personal preferences.



Multi-Account Positions

Ability to see holdings summarized across all accounts linked to a user

Detailed information on the multi-account positions includes:

MANAGE ACCOUNT GROUPS

This link will give users the ability to select specific accounts to form a group. Once the group is created, it will be visible in the accounts selection menu. If the group is selected, only the accounts within that group will be displayed throughout holdings.

Holdings

All Accounts Selected Manage Account Groups Stocks

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Holdings Asset View My Custom View + Custom View

Total Securities: **\$16,518,890.10**

Total Account Value: **\$16,591,257.48**

Previous 1 2 3 4 Next

Asset Type	Description	Symbol / CUSIP	Quantity	Price	Daily Price Change	Market Value	Daily Value Change	Daily % Change	Estimated Yield
+	Stocks	KLA-TENCOR CORP XXX SUBMITTED FOR STOCK	45	\$75.34	\$0.00	\$3,390.30	\$0.00	0.00%	0.00%
-	Stocks	APPLE INC	1,749	\$96.88	-\$0.54	\$169,443.12	-\$944.46	-0.55%	2.15%

Account	Nickname	Quantity	Market Value	Daily Value Change
12345678	Advantage Account 2	1,263	\$122,359.44	-\$682.02
12345679	Pledged Asset Account 2	12	\$1,162.56	-\$6.48
12345680	IRA 3	474	\$45,921.12	-\$255.96

Order Status

Addition of displays and custom views

Detailed information on the Order Status includes:

GROUP BY STATUS

Select Group by Status to see an alternate view of the order status screen.

CUSTOM VIEW

Select +Custom View to choose options for a custom page. Once the custom page has been created, select the name of the custom page to view.

Order Status

print Messages

12345678 - Advantage Account All Asset Types All Statuses All Order Types

Order Status Group by Status + Custom View

Transaction	Original Quantity	Remaining Quantity	Symbol	Price	Time In Force	Instructions	Security Type	Date & Time	Order ID	Status	Actions
Sell To Close	20	20	SPY CALL 2...	Market	Day	-	Options	Jul 13, 2016 3:55:00 PM ET	SVR-24501336	Rejected	
Sell To Close	20	-	SPY CALL 2...	Market	Day	-	Options	Jul 13, 2016 3:55:00 PM ET	04440959 4H0221	Executed	
Buy To Open	10	-	GOOG CALL...	Market	Day	-	Options	Jul 13, 2016 11:49:00 AM ET	04425340 OL0027	Executed	
Buy To Open	6	-	NFLX CALL...	Market	Day	-	Options	Jul 13, 2016 11:45:00 AM ET	04424980 OL0026	Executed	
Buy To Open	6	6	SPY CALL 2...	Limit \$5.00	Day	-	Options	Jul 13, 2016 11:40:00 AM ET	04424709 OL0025	Expired	
Buy To Open	4	-	LL CALL 15...	Limit \$2.60	Day	-	Options	Jul 13, 2016 11:32:00 AM ET	04424215 OL0024	Executed	
Buy To Open	10	3	UA CALL 40...	Limit \$3.70	Day	-	Options	Jul 13, 2016 11:32:00 AM ET	04424307 4H0126	Executed	
Buy To Open	10	-	UA CALL 40...	Limit \$3.70	Day	-	Options	Jul 13, 2016 11:32:00 AM ET	04424307 4H0126	Executed	
Buy To Open	10	6	UA CALL 40...	Limit \$3.70	Day	-	Options	Jul 13, 2016 11:32:00 AM ET	04424307 4H0126	Executed	
Buy To Open	10	10	UA CALL 40...	Limit \$3.75	Day	-	Options	Jul 13, 2016 10:30:00 AM ET	SVI-24500689	Rejected	
Buy To Open	100	100	GE PUT 31...	Limit \$0.23	Day	-	Options	Jul 13, 2016 10:21:00 AM ET	04419517 4H0081	Cancelled	

Order Status

print Messages

12345678 - Advantage Account* All Asset Types All Statuses All Order Types

Order Status Group by Status + Custom View

Executed

Transaction	Original Quantity	Remaining Quantity	Symbol	Price	Time In Force	Instructions	Security Type	Date & Time	Order ID	Actions
Sell To Close	20	-	SPY CALL 2...	Market	Day	-	Options	Jul 13, 2016 3:55:00 PM ET	04440959 4H0221	
Buy To Open	10	-	GOOG CALL...	Market	Day	-	Options	Jul 13, 2016 11:49:00 AM ET	04425340 OL0027	
Buy To Open	6	-	NFLX CALL...	Market	Day	-	Options	Jul 13, 2016 11:45:00 AM ET	04424960 OL0026	
Buy To Open	4	-	LL CALL 15...	Limit \$2.80	Day	-	Options	Jul 13, 2016 11:32:00 AM ET	04424215 OL0024	
Buy To Open	10	3	UA CALL 40...	Limit \$3.70	Day	-	Options	Jul 13, 2016 11:32:00 AM ET	04424307 4H0126	
Buy To Open	10	-	UA CALL 40...	Limit \$3.70	Day	-	Options	Jul 13, 2016 11:32:00 AM ET	04424307 4H0126	
Buy To Open	10	6	UA CALL 40...	Limit \$3.70	Day	-	Options	Jul 13, 2016 11:32:00 AM ET	04424307 4H0126	

Cancelled

Transaction	Original Quantity	Remaining Quantity	Symbol	Price	Time In Force	Instructions	Security Type	Date & Time	Order ID	Actions
Buy To Open	100	100	GE PUT 31...	Limit \$0.23	Day	-	Options	Jul 13, 2016 10:21:00 AM ET	04419517 4H0081	

Rejected

Transaction	Original Quantity	Remaining Quantity	Symbol	Price	Time In Force	Instructions	Security Type	Date & Time	Order ID	Reject Reason	Actions
Sell To Close	20	20	SPY CALL 2...	Market	Day	-	Options	Jul 13, 2016 3:55:00 PM ET	SVR-24501336	We can only acc...	
Buy To Open	10	10	UA CALL 40...	Limit \$3.75	Day	-	Options	Jul 13, 2016 10:30:00 AM ET	SVI-24500899	Invalid Price -...	

Activity Page

The ability to choose more than one transaction type from the filter menu on the Activity page, along with the ability to create a custom view

Detailed information on the Activity Page includes:

CUSTOM VIEW

Select +Custom View to choose options for a custom page. Once the custom page has been created, select the name of the custom page to view.

Activity

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12345678 - IRA All Transactions Enter Symbol Date Range From Date 06/13/2016 Until Date 07/13/2016

Activity + Custom View

Date	Type	Symbol / CUSIP	Description	Quantity	Price	Amount
Jul 13 2016	Asset Sold	HMST	HOMESTREET INC	-325	\$20.69	\$6,723.68
Jun 30 2016	Reinvest Div		GENERAL MONEY MARKETEDP	-	-	-\$0.28
Jun 30 2016	Dividend		GENERAL MONEY MARKET 063016 22,116	-	-	\$0.28
Jun 23 2016	Asset Bought	ALRM	ALARM COM HOLDINGS INC	270	\$24.97	-\$6,741.14
Jun 15 2016	Asset Bought	QTWO	Q2 HOLDINGS INC	240	\$27.49	-\$6,597.10