DISCOVER THE STIFEL DIFFERENCE

As a Stifel client, you'll enjoy access to the resources of one of the ***nation's leading*** full-service wealth management and investment banking firms, but with the ***personal attention of a boutique firm***.

Stifel is a firm built ***around its clients***.
Here is a sampling of how you'll ***benefit*** from working with us.

Culture

CLIENT-FIRST PHILOSOPHY

Our financial advisors are empowered to do what's best for their clients. That means your advisor is free to recommend the products and services he or she feels are most appropriate for you and your goals. At Stifel, you won't be plugged into a "one-size-fits-all" model, we won't nickel and dime you with fees, and you'll never have to worry about being relegated to a call center. Our focus is on delivering personal service as we help you with your personal financial journey.

ADVANCED TECHNOLOGY

At Stifel, we embrace technology as a means of enhancing the personal service of your advisor, not replacing it. As a Stifel client, you'll benefit from comprehensive client performance reporting capabilities, along with convenient mobile apps and online services to make your life easier.

Resources

COMPREHENSIVE WEALTH PLANNING

From guiding you through the intricacies of estate planning and tax laws, to developing optimal Social Security and Medicare claiming strategies, our team of wealth planning professionals will work with your advisor and tax and accounting professionals to address all aspects of your financial picture.

BANKING SERVICES

Stifel makes it easy to address both sides of your balance sheet. Through Stifel Bank, you can take advantage of a full range of lending and cash management services whenever you need them, introduced through your trusted financial advisor. Stifel Bank's credit, lending, and liquidity services address your personal and business needs so that you and your advisor may choose what is most appropriate for your specific situation.

TRUST SERVICES

Stifel Trust Companies provide a full array of trust services designed to help you implement your estate planning, charitable giving, and estate management strategies. In addition to traditional trust services, our Delaware trust services can assist you with your closely held or non-liquid assets. You'll receive the personalized attention of an experienced, dedicated trust officer and investment officer, with your trusted financial advisor serving as the relationship manager.

HIGH-NET-WORTH SERVICES

As your needs become more complex, your Stifel advisor can introduce you to a variety of sophisticated investment offerings, from alternative investments and structured products to hedge funds and private equity. We also offer strategic and tactical asset allocation models to help you pursue your unique goals and corporate executive services to recommend strategies for your company shares and stock options.

BROAD SPECTRUM OF DEDICATED MONEY MANAGERS

Your financial advisor has access to Stifel's stand-alone asset management affiliates, which provide professional management and oversight over a breadth of asset classes. Each affiliate has proven strengths that may be appropriate for your investing needs.

INSTITUTIONAL SERVICES

Your financial advisor can connect you and your business with our full-service investment banking capabilities, from capital raising and public offerings to private placements, syndicate services, debt restructuring, mergers and acquisitions consulting, and more.

Intellectual Capital

ROBUST RESEARCH

Providing solid, studied investment advice has been our hallmark since 1890. Our broad U.S. equity research platform – one of the nation's largest – is committed to bringing you new and unique investment ideas.

THOUGHT LEADER INSIGHTS

Stifel's thought leaders provide insightful analysis on economic and market trends to keep you informed and help you make educated investing decisions.

FINANCIAL ID

Our proprietary Stifel Financial ID uses behavioral finance concepts to help you determine your personal investing style and pursue your goals in a manner that's consistent with your natural inclinations.

Joseph DePasqua, AAMS®
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