

STIFEL

WEALTH TRACKER



Organize your financial life – *with one free app.*

The Wealth Tracker Promise

CONTROL

We built Stifel Wealth Tracker to put you in control of your financial life and data. Your personal data belongs to you; and it is only valuable to us as the foundation of a trusting relationship. We believe the best way to earn your trust is to give you control over the data you provide and secure it while we hold it.

CONNECT

As you explore your financial situation, you're bound to have questions. Am I on the right track? What more could I be doing? Do I need a comprehensive plan? Whenever you need it, guidance from an experienced Stifel financial advisor is just a call or click away.

ORGANIZE

Organize all of your financial information in one place. Create a personal balance sheet. Securely view investments, retirement accounts, and more from any of your financial institutions.

TRACK

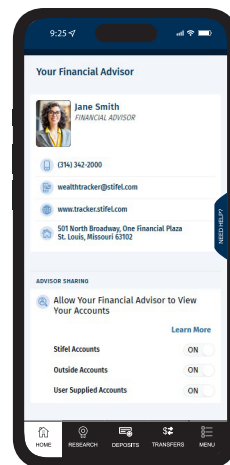
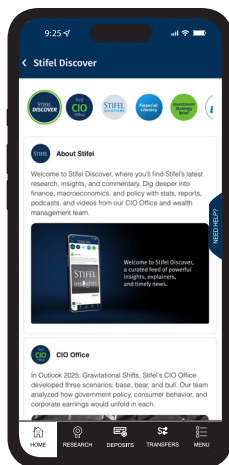
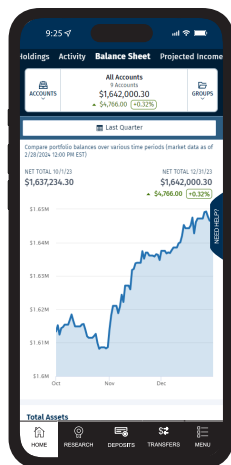
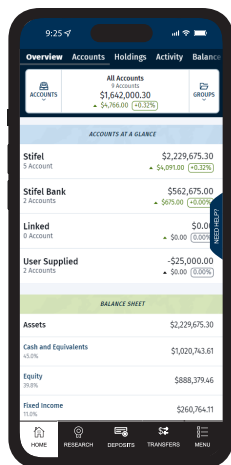
Sync your accounts to get an up-to-date view of your full financial picture. Track your spending patterns, evaluate your net worth, and compare assets and liabilities.

DELVE DEEPER

Analyze your investment performance in real time. Take a deep dive into how and where your assets are allocated. Complete a risk profile to align your holdings with your financial goals, risk tolerance, and time horizon.

DISCOVER

Stifel Discover is an in-app feed that puts the firm's most powerful insights right at your fingertips. Stay informed about the financial markets and the companies you're invested in with timely market news and updates.



DOWNLOAD WEALTH TRACKER TODAY! ►



Questions?

Contact Stifel Wealth Tracker at (866) 697-8433 or wealthtracker@stifel.com.

Monday – Friday
5:00 a.m. – 8:00 p.m. Central

Saturday
5:00 a.m. – 6:00 p.m. Central

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