

Stifel's Public Site | <https://www.stifel.com/>

- Stifel's website can be used to sign up for "Stifel Wealth Tracker" in order to obtain Tax Forms electronically. <https://tracker.stifel.com/tracker/uux.aspx#/login>
- Tax Reporting Department – Available Monday - Friday (9:00 a.m. - 4:30 p.m. Central), at Toll-Free (800) 401-0088 or in St. Louis at (314) 342-2835.
- Important Disclosures – Current year Money Market Tax information can be found in the Investor Relations area under Money Market Disclosure and then Money Market Tax Info.
<https://www.stifel.com/investor-relations/money-market-tax-info>
- Royalty Trust Booklets – In order for Trust Interest Holders of Royalty Trusts to properly report tax consequences of ownership of a trust interest, certain information is needed. Historically, this information has been distributed by Royalty Trust through annual tax packages or booklets to all Trust Interest Holders. Under the Widely Held Fixed Investment Trust (WHFIT) regulations, this information must now be provided by the Nominees, such as Stifel. The Nominees are permitted, under the new regulation, to provide investors with the address of a website where the information can be found in lieu of mailing the information. All of this information can be found under Individuals and then Tax Reporting Information. <https://www.stifel.com/disclosures/tax-reporting/royalty-trust>

IRS Public Site | <https://www.irs.gov/>

- The IRS website can be used to research and find forms and publications for individuals and entities. All official IRS Instructions for our forms can also be found on this site.
- IRS Federal Tax Questions – **(800) 829-1040**
- IRS National Taxpayer Advocate Help – **(877) 777-4778**

Price Waterhouse K-1 Information | <https://www.taxpackagesupport.com/>

- This website has contact information for MLP K-1s.

Deloitte K-1 Information | <https://partnerdatalink.com/landing/landing.html>

- This website has contact information for MLP K-1s.

FannieMae | <https://taxfactors.efanniemae.com/taxfactors/>

FannieMae factor website

- REMIC Information and REMIC Tax Help – remictaxhelp@fanniemae.com

Securities and Exchange Commission | <https://www.sec.gov/index.htm>

- U.S. Securities and Exchange Commission – Contains a variety of information about companies, including current filings and how to request information from the company, such as prospectuses, etc.

Department of Labor | <https://www.dol.gov/ebsa/>

- Department of Labor contains information regarding various types of Retirement Plans and ERISA regulations.

Department of Health and Human Services | <https://www.hhs.gov/healthcare>

- Department of Health and Human Services contains information regarding the Affordable Care Act