Estate & Tax Planning Services

At Stifel, we recognize that proper estate and tax planning are crucial to pursuing financial success. We also recognize that the estate and tax planning processes can seem complicated and overwhelming. In order to help you navigate these processes with confidence, Stifel has developed an array of estate and tax planning services. These complimentary services are designed to provide you with the knowledge necessary to take full ownership of your estate and tax planning situation.

In addition to our daily availability to answer questions that you or your Stifel Financial Advisor may have, we continually strive to enhance our library of informational literature pertaining to important estate and tax planning concepts. Because we recognize the personal nature of estate and tax planning, we also offer the following services aimed at helping you more fully understand your unique estate and tax planning situation.

Estate Plan Analysis

Whether you have an existing estate plan or are just beginning the estate planning process, one of our estate planning professionals will conduct a comprehensive review of your situation. He or she will then work with you and your Stifel Financial Advisor to help you understand your estate planning situation while identifying areas for improvement. In order to best serve you, our estate planning professionals may ask that you provide certain information, including any existing estate planning documents (e.g., wills, trusts, and powers of attorney).

Income Tax Analysis

Similar to our estate plan analysis services, one of our tax planning professionals will conduct a comprehensive review of your income tax situation. He or she will then work with you and your Stifel Financial Advisor to help you understand your income tax situation while identifying strategies that may impact your investment strategy, better prepare you for a successful retirement, or potentially reduce your tax liability. In order to best serve you, our tax planning professionals may ask that you provide certain information, including two prior years of federal and state income tax returns.

For more information or to take advantage of our estate and tax planning services, please contact your Stifel Financial Advisor.

STIFEL

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