Wealth Planning Department

Personalized Strategies Through Holistic Planning

At Stifel, we understand that each of our clients has a unique set of circumstances that shapes his or her financial goals and objectives. These goals and objectives cannot be addressed through cookie-cutter solutions. Working together with the Stifel Financial Advisor, the Wealth Planning Department takes the time to understand each client's story, so that we can more effectively implement our services to develop personalized strategies.

Our holistic approach to wealth planning leverages the knowledge and expertise of our firm's experienced professionals to address all aspects of a client's financial situation.

Financial Planning

Our team of financial planning professionals will work closely with the client and his or her Stifel Financial Advisor to generate a comprehensive wealth management plan. Clients can use this plan as a roadmap to help ensure they stay on track toward achieving their financial goals. The financial planning process provides in-depth analysis on critical issues such as retirement planning, asset allocation, net worth, insurance needs, estate preservation and funding, and education funding.

Estate Planning

Our team of estate planning professionals will guide the client through the intricacies and complexities of the estate planning process. By providing the client with an in-depth analysis of his or her existing estate plan, we will identify strategies for the client to discuss with a local estate planning attorney.

Income Tax Planning

Our team of tax planning professionals will help the client navigate federal and state income tax laws. By analyzing the client's tax returns from the last two years, we will identify proactive tax planning ideas for the client to discuss with a local tax advisor.

Insurance and Annuity Solutions

Our team of insurance and annuity professionals will help the client protect against some of the pitfalls he or she may encounter on the path to financial success. By evaluating the client's existing policies and individual needs, we will develop a customized insurance and annuity program that is adequate, efficient, and cost-effective.

Social Security

Our team of financial planning professionals will help the client determine when and how to claim his or her Social Security benefits. As part of this process, we will create a Social Security report that demonstrates the client's optimal claiming strategy.

Everybody has a story. Through our holistic approach to wealth planning, we strive to help every client make financial success a part of theirs.

STIFEL

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