# STIFEL

## Fueling Growth for Financial Advisors

While Stifel has all of the product offering of the wirehouses the additional support we offer advisors is our biggest differentiator. Take a look at the ways we can help you embrace your entrepreneurial spirit and take your business to the next level

## FULL-SERVICE MARKETING

We're here to help you reinvent your brand, engage your prospects, and ultimately grow your book of business. Whether it's websites, social media, brochures, videos, announcements, or something else, we can do it all, so you can hit the ground running the day you start at Stifel.

And once you're settled, our marketing team of writers, designers, strategists, and our compliance team are here to provide you access to the best tools, latest technology, and hands-on support needed to help your business thrive.

## BEST-OF-BREED TECHNOLOGY

At Stifel, we've super-charged our digital transformation by investing in technology built for advisors so that you can focus on your clients – and win new ones.

**Stifel Wealth Tracker** is our client- and prospect-facing application that allows users to aggregate and view all of their financial information in one secure location. As a bonus, prospects can connect with you – their advisor – with just the click of a button for personalized support and recommendations. We're turning prospects into clients, one tool at a time.

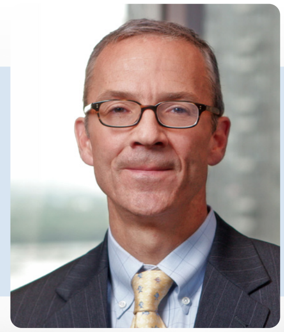
**Addepar** brings our advisors industry-leading client reporting software. With Addepar, you can provide a high-touch, fully customized experience, aggregating your clients' investable assets to report on their complete financial picture and help them track progress toward their financial goals. Plus, our operations teams perform daily reconciliation of this system to ensure accurate portfolio reviews.

**Salesforce Wealth** was built based on feedback from advisors and their support staff, to better support their business. As such, our CRM implementation of Salesforce is unlike any other in the industry. The platform is forward looking, mobile friendly, and enables superb collaboration and follow-through – and it beautifully integrates with all of our digital applications, allowing for complete customization to match your business practice.

**MoneyGuidePro®** is our primary data-gathering tool that helps advisors tune into each client's specific needs. Using MoneyGuidePro®, advisors can delve into their clients' financial situations, including investable assets, savings, insurance needs, and estate planning issues.

*"We create solutions based on conversations with our financial advisors. You know, the people actually using the technology. They've told us they want simplicity, convenience, relevance, and agility. Something that's best-in-class. And we've delivered."*

**– David Sliney,** *Chief Operating Officer*



# NATIONALLY RECOGNIZED RESEARCH

Stifel's Equity Research Group consists of award-winning analysts, many with significant hands-on experience in their respective industries.  The team offers objective, in-depth analysis and timely, actionable research ideas on more than 2,000 stocks across 13 sectors and geographies.  Combined with KBW, Stifel operates one of the nation's largest U.S. equity research platforms and is the largest provider of global small cap coverage.

# ROBUST PLATFORM

At Stifel, you'll find sophisticated resources for high-net-worth investors, all the investment tools you need to serve your clients as you see fit, and more.  Our platform is designed to meet the needs of any client.  You should know, our platform also includes:

**High-Net-Worth Division:**
From structured products and alternative investments to portfolio solutions and consulting services, our custom and creative solutions are backed by rigorous due diligence and ongoing monitoring.

**Stifel Bank:**
An extension of our advisors' relationships with their clients, we provide a full range of innovative financial tools and loan programs to our clients.

**Wealth Planning:**
Our Teams Serve as an extension of your team, making you the expert in financial planning estate and tax planning, insurance and annuity solutions, social security, medicare and more.

**Corporate Services:**
Our team can help you navigate the complex rules and regulations pertaining to your clients' company shares and stock options.

**Trust and Estate Planning:**
Stifel's trust companies were formed to serve as a partnership with our financial advisors. This collaborative approach ensures your clients' wishes are handled with the same knowledgeable guidance and advice you provide.

**Cash Management:**
Stifel offers access to a full suite of payment capabilities via our cash management solutions. While great for the occasional payment, these solutions are also an attractive alternative to a traditional page.

*"Stifel is a powerhouse wealth management firm that enables growth by providing our advisors with the perfect combination of culture and platform. We were built for advisors just like you, who are already successful but still have that drive to be better. Ask yourself, what is your firm doing to support your continued growth?"*

**– Ron Kruszewski,** *Chairman and CEO*

# WHAT ADVISORS ARE SAYING

*"We have everything the big wirehouses have but without the bureaucracy. Our business is supported by extremely talented, accessible people at Stifel who practice the golden rule and consistently put clients first. The culture here is truly refreshing. Stifel trusts us and embraces our entrepreneurial spirit. I attribute our growth to that trust."*

**– Thomas Lieser, Jr.,CFP®,** *Managing Director/Investments, Branch Manager*

*"What really stands out here is that local management expressed a willingness to do whatever is necessary to help our business prosper. At Stifel, they are always working to get to a 'yes' even when 'no' is a much easier answer."*

**– Stephen Barbera,** *Managing Director/Investments*

*"We've had tremendous growth in our business, and part of that is attributed to Stifel's incredible reputation. You're given all the ingredients you need to grow your business and your branch, and Stifel lets advisors have that open architecture to run their business in the way they'd like with clients."*

**– Rita Mahn,** *Senior Vice President/Investments, Branch Manager*

*"In my transition here to Stifel, I ended up with more assets under management than when I left my previous firm, which was pretty fun to see. I think it was really a combination of my team's organization but also the ability and the platform and the resources that Stifel provided in order to get there."*

**– Joshua Glass,** *Managing Director/Investments*

**Ready to take your business to the next level?**
**Get in touch: advisoropportunities@stifel.com**

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