



Transferring Your Trust Account to Stifel Trust

One of the most important estate planning decisions people face is: “Who should I designate as trustee of my trust? Who is best suited to take care of financial matters for my beneficiaries?” Often the choice may be a professional trustee – a trust company.

If you are a beneficiary of a trust managed by a professional trustee, then someone pondered these questions years ago, wishing to select the best trustee to manage the account for your benefit. But the passage of time brings change. Through such changes, the level of service you receive may not have kept pace with your expectations.

The Most Important Criterion Upon Which to Judge a Trust Company Is Service

In general, all trust companies are capable of prudently managing a trust’s portfolio, cutting checks, and keeping accurate records. But what differentiates one trust company from another is the way they relate to their clients. Which one treats you like your business is valued? Which one treats you like a unique individual and not just an account number? Which one really listens to you and understands your point of view?

Because Stifel Trust Company, N.A. works with your Stifel Financial Advisor, we are specially positioned to deliver “white glove” service as your trustee.* In effect, you have three professionals you can turn to for service.

Financial Advisor	Trust Officer	Investment Officer
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Your Stifel Financial Advisor, who knows you and your situation best, will serve as the relationship manager and can be your first point of contact when a need arises. Your Financial Advisor, in turn, is backed up by your dedicated Trust Officer and Investment Officer at Stifel Trust. These specific professionals are assigned to your account and will handle your needs directly. With Stifel Trust, you will work with people who know you by name, not random employees who answer a toll-free number.

Resources

Our trust professionals, in turn, are supported by the experience, talent, and resources of Stifel, one of the nation’s leading financial firms. Stifel Trust leverages asset allocation and investment programs, as well as capital market data, research, and investment product oversight. The result is a set of investment options that offers broad diversification and allows us to construct portfolios appropriate for the goals and risk tolerances specific to each trust.

**Personal service backed by state-of-the art capabilities.
That’s a combination that’s hard to beat.**

When your trust was created, surely the desire was to select a trustee who could deliver the highest level of service on behalf of the beneficiaries. Is Stifel Trust appropriate for your situation? Can your trust be transferred to Stifel Trust and, if so, how? Take a first step toward better service, and contact your Stifel Financial Advisor for answers to these and other questions about Stifel Trust.

▶ For more information on transferring your trust account to Stifel Trust, please contact your Stifel Financial Advisor.

Diversification and asset allocation do not ensure a profit or protect against loss.

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Investment Services Since 1890