

STIFEL

Introducing Stifel Trust Services

Offering a full array of trust services for individuals and organizations



Administering a trust can be burdensome, difficult, and confusing. That's why **many people use professional trust companies like Stifel Trust.**

As part of the Stifel family, Stifel Trust embodies the firm's commitment to exceed client expectations. Our **highly experienced team** averages more than 20 years in the industry.

Our Services

Stifel Trust offers a full array of trust services for individuals and organizations. We serve as trustee or co-trustee, investment manager, or custodian for individuals and not-for-profits.

We can provide professional management and oversight for:

Living and Testamentary Trusts	Charitable Trusts
Investment Accounts and Endowment Funds	IRAs
Supplemental Needs Trusts	And Other Trust Arrangements

Resources

Stifel Trust is backed by the experience, talent, and resources of Stifel.

In managing trust assets, Stifel Trust uses Stifel's extensive asset allocation and investment programs. We also tap into Stifel's research, due diligence, and investment product oversight capabilities.

The result is a set of investment options that offers broad diversification coupled with the ability to tailor portfolios to the goals and risk tolerance of each trust.

The Stifel Trust Investment Philosophy

Our investment approach incorporates managed money and asset allocation strategies to help mitigate risk and work toward investment objectives.

Your trust's investment portfolio may be comprised of:

- A mix of carefully selected mutual funds exchanged traded funds;
- Individual securities managed by professional managers; or
- A blend of mutual funds, exchange traded funds, and professionally managed securities.

Your account's size and objectives will determine which option is best suited to your trust.

White Glove Service

At many other firms, client service comes in the form of a call center. The level of support you receive may depend on which anonymous worker answers your phone call.

At Stifel, however, your trusted Financial Advisor serves as your primary point of contact. He or she is backed by a dedicated Trust Officer and Investment Officer at Stifel Trust – specific professionals assigned to your account.

In effect, you will have three professionals working on your behalf. This proven service model enables us to deliver high-touch, "white glove" service.

Stifel Financial
Advisor



Stifel Trust
Investment Officer

Stifel Trust Officer

For more information, please contact your Stifel Financial Advisor.

Learn more at www.StifelTrust.com

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

Trust and fiduciary services are provided by Stifel Trust Company, N.A., Member FDIC, and Stifel Trust Company Delaware, N.A., Member FDIC (collectively, “Stifel Trust Companies”). Stifel Trust Companies are affiliated with Stifel, Nicolaus & Company, Incorporated, Member SIPC & NYSE, each a wholly owned subsidiary of Stifel Financial Corp. **Unless otherwise specified, references to “Stifel” may mean Stifel Financial Corp. and/or any of its subsidiaries. Non-deposit products purchased from or held by Stifel and/or Stifel Trust Companies are not insured by the FDIC, are not deposits, and may lose value.** None of Stifel, Stifel Trust Companies, nor affiliated companies provide legal or tax advice.

The investment return and principal value of funds will fluctuate; and an investor's shares, when redeemed, may be worth more or less than their original cost. Mutual funds charge advisory fees and other internal expenses that are separate and distinct from the quarterly fees charged by Stifel Trust. ETFs trade like a stock and may trade for less than their net asset value. For a review of the fees, services, and disclosures associated with this portfolio, please refer to your copy of the Stifel Trust Disclosure Document.

STIFEL
Investment Services Since 1890