



## Introducing Stifel Trust Services

Offering a full array of trust services for individuals and organizations

Administering a trust can be burdensome, difficult, or 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;
- 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.

Financial  
Advisor

Trust Officer

Investment  
Officer

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

**For more information on Stifel Trust services, please contact your Stifel Financial Advisor.**

*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. and Stifel Trust Company Delaware, N.A. (collectively Stifel Trust Companies),** wholly owned subsidiaries of Stifel Financial Corp. and affiliates of Stifel, Nicolaus & Company, Incorporated, Member SIPC & NYSE. **Unless otherwise specified, products purchased from or held by Stifel Trust Companies are not insured by the FDIC or any other government agency, are not deposits or other obligations of Stifel Trust Companies, are not guaranteed by Stifel Trust Companies, and are subject to investment risks, including possible loss of the principal invested.** Neither 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