STIFEL | Comprehensive Investment Planning and Wealth Management

Integrity is the cornerstone of our practice. We focus on personalized wealth management and helping our clients implement disciplined behaviors for the long term.

Let us show you what Stifel can do for you.

Our Process

Using MoneyGuidePro® as our primary data-gathering tool, we delve into your financial situation, including investable assets, savings, insurance needs, and estate planning issues. During our consultative process, we are committed to:

- Understanding your unique financial blueprint
- Developing unbiased and tax-efficient wealth management strategies
- Presenting our strategies in a clear and comprehensible manner

We understand how important your wealth is to you and are open and transparent about costs as well as any fees associated with our service.

Our Research

We take full advantage of market research and money management analysis offered through Stifel and outside resources.

Stifel is home to the industry's largest U.S. equity research platform. Our equity research has ranked in the top ten in the Thomson Reuters Analyst Awards for eleven consecutive years (includes Keefe, Bruyette & Woods, a wholly owned subsidiary of Stifel Financial Corp., and other firms acquired by Stifel). For more information about the Thomson Reuters StarMine Analyst Awards, see www.stifel.com/research.

Partnering with global money management firms, we receive timely information on the markets and outside perspectives to which the average investor may not have access.

We utilize a rigorous process to find the most suitable investment products to help our clients pursue their goals.

Serving You

We are available to discuss your concerns and changing needs. In addition to the quarterly updates and formal annual reviews, client communication and education are an integral part of our practice.

We coordinate with your other professional service providers, such as your estate planning attorney and tax professional, to deepen our understanding of your overall personal situation and needs.

Being active in our community is very important to us. We believe that participating and giving back is essential in being part of the community in which we live and serve.

Having more than 60 years of combined investment experience, we have earned the trust of multigenerational relationships that span from grandparents to grandchildren.

We care about you and your family – our clients are people we enjoy working with and consider to be our friends.

Jacqueline T. Wieland, AIF®
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