

## **STIFEL INVESTING**

*Planning for the Future*

### **HERE TODAY, THERE TOMORROW**

The possibilities of tomorrow intrigue us. They excite us. And, at times, they concern us.

Without knowing exactly what the future holds, we may question the plausibility of realizing our hopes and dreams, including our financial goals. Ensuring aspirations become reality requires both foresight and action.

**Creating a solid plan of action is one of the most important factors in determining if investors will achieve financial goals.**

#### *Building Your Roadmap*

Establishing clear goals is the first step in embarking toward a successful financial future. Many investors look forward to a secure, comfortable retirement with sufficient income. Some hope to make a college education a reality for their children or grandchildren. Others hope to enjoy the pleasures of travel they've always promised themselves.

By developing a financial road map, you can begin to realize what steps must be taken to work toward your goals.

Dreaming of your future plans is easy, but planning can be time-consuming and complex. That's why so many investors never bother to develop a plan, and may never reach their goals.

As a Stifel financial advisor, I can help you clear the obstacles that stand in your way and assist you in developing a wealth management plan tailored to your unique goals.

At Stifel, we've developed a program that seeks to simplify the planning process, making it manageable and convenient. Through *The Stifel Wealth Strategist Report*®, we can conduct a top-to-bottom evaluation of your financial situation. This program sets the groundwork for your financial roadmap.

#### *Assessing the Situation*

Our consultative process involves reviewing financial and non-financial assets, savings and investing practices, and the ability to pursue stated financial goals.

#### *The First Day of Your Future*

Preparing for tomorrow begins today. By requesting a confidential investment questionnaire, you can take the first step toward understanding your current financial situation and developing a plan for tomorrow. Call our office for more information regarding the *Stifel Wealth Strategist Report*®.

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