

FOR IMMEDIATE RELEASE

**STIFEL'S ED MOLDAVER RANKS IN TOP 20 ON  
BARRON'S TOP 100 FINANCIAL ADVISORS IN AMERICA LIST**

**ST. LOUIS, May 1, 2019** – Stifel Financial Corp. (NYSE: SF) today announced that Ed Moldaver, Managing Director/Investments and Founding Partner of The Moldaver Paterson & Lee Group, was named to the Barron's Top 100 Financial Advisors list for the third straight year.<sup>1</sup> Mr. Moldaver ranked No. 19 – up from No. 29 in 2018.

“It’s a great honor to be on this very prestigious list, considering that there are 300,000 financial advisors in America,” said Mr. Moldaver. “There’s an old proverb, ‘You can’t create experience. You must undergo it.’ I’ve taken this to heart in building this team. Collectively, our team has close to 200 years of industry-related experience in their diverse and specialized areas of wealth management. Day in and day out, at a granular level, the team is committed to delivering the comprehensive advice our highly sophisticated clients need. Although my name is the one that is on this list, it is the team effort that got me here.”

The Moldaver Paterson & Lee Group is one of Stifel’s leading wealth management teams. In addition to Mr. Moldaver, it also includes former New York Governor David A. Paterson, James Lee, and eight other investment professionals. The team maintains a laser focus on the ultra-high-net-worth market, primarily serving business owners and entrepreneurs. Their wealth management process goes beyond investment planning to include wealth enhancement, transfer, and risk mitigation strategies, as well as charitable gifting, which resonates with the unique needs of ultra-high-net-worth clients. The team also utilizes Stifel’s preeminent middle-market investment bank, which specifically caters to their typical clients and not just Fortune 500 companies.

In addition to this year’s Top 100 Financial Advisors list, Mr. Moldaver has appeared in the following rankings:

- Barron’s Top 100 Financial Advisors in America in 2018 (No. 29), 2017 (No. 30), and 2012 (No. 86)<sup>1</sup>
- Barron’s Top 1,200 U.S. Financial Advisors in 2019 (No. 8 in the state of New York) and 2018 (No. 12 in the state of New York)<sup>2</sup>
- Barron’s America’s Top 1,000 Advisors in 2012 (No. 1 in the state of New Jersey), 2011 (No. 5), and 2010 (No. 10)<sup>3</sup>
- Forbes America’s Top Wealth Advisors in 2018 (No. 41)<sup>4</sup>
- Forbes Best-In-State Wealth Advisors in 2019 (No. 7 in New York City) and 2018 (No. 15)<sup>5</sup>

Mr. Moldaver has contributed to and been featured in *The Wall Street Journal*, *Barron’s*, *Fox Business*, *Crain’s New York Business*, and dozens of other national publications and media outlets. He has also authored two books on investing.

The Moldaver Paterson & Lee Group is based in Stifel’s New York City office, located at 3 Bryant Park. They can be reached by calling (212) 328-1000 or (844) 735-9471. For more information, visit [www.moldaverpatersonleewealthstrategies.com](http://www.moldaverpatersonleewealthstrategies.com).

<sup>1</sup> *Barron's* "Top 100 Advisors," April 20, 2019, April 21, 2018, April 17, 2017, and April 14, 2012, as identified by *Barron's* magazine, using quantitative and qualitative criteria and selected from a pool of over 400 qualified nominees.

<sup>2</sup> *Barron's* "Top 1,200 Advisors," March 8, 2019, and March 12, 2018, as identified by *Barron's* magazine, using quantitative and qualitative criteria and selected from a pool of over 4,000 nominations.

<sup>3</sup> *Barron's* "Top 1,000 Advisors," February 20, 2012, February 19, 2011, and February 20, 2010, as identified by *Barron's* magazine, using quantitative and qualitative criteria and selected from a pool of over 4,000 nominations.

Advisors in the Top 100 Financial Advisors, Top 1,000 Financial Advisors, and Top 1,200 Financial Advisors have a minimum of seven years of financial services experience. Qualitative factors include, but are not limited to, compliance record and philanthropic work. Investment performance is not a criterion. The rating may not be representative of any one client's experience and is not indicative of the financial advisor's future performance. Neither the broker-dealer nor its financial advisors pay a fee to *Barron's* in exchange for the rating. *Barron's* is a registered trademark of Dow Jones & Company, L.P. All rights reserved.

<sup>4</sup> *Forbes* "America's Top Wealth Advisors," September 12, 2018. Rankings are based on the opinions of SHOOK Research, LLC, and were selected from a pool of over 25,000 nominations.

<sup>5</sup> *Forbes* "Best-In-State Wealth Advisors," February 21, 2019, and February 15, 2018. Rankings are based on the opinions of SHOOK Research, LLC, and were selected from a pool of nearly 30,000 nominations in 2019 and over 21,000 nominations in 2018.

Advisors in *Forbes*' "Best-In-State Wealth Advisors" and *Forbes*' "America's Top Wealth Advisors" are judged on individual contribution, but total team assets are shown, which can include one or more additional advisors. Qualifying advisors met the following basic requirements: a minimum of seven years as an advisor, a minimum of one year at their current firm, recommended and nominated by their firm, completion of an online survey, over 50% of their revenue/production must be with individuals, and an acceptable compliance record. The ranking algorithm is based on qualitative measures derived from telephone and in-person interviews and surveys; service models, investing process, client retention, experience levels, review of compliance records, firm nominations, etc.; and quantitative criteria, such as assets under management and revenue generated for their firms. Investment performance is not a criterion. Neither SHOOK Research nor *Forbes* receives compensation from the advisors or their firms in exchange for placement on a ranking. The ranking may not be representative of any one client's experience and is not indicative of the financial advisor's future performance. *Forbes* is a registered trademark of Forbes, Inc. All rights reserved.

## **Stifel Company Information**

Stifel Financial Corp. (NYSE: SF) is a financial services holding company headquartered in St. Louis, Missouri, that conducts its banking, securities, and financial services business through several wholly owned subsidiaries. Stifel's broker-dealer clients are served in the United States through Stifel, Nicolaus & Company, Incorporated, including its Eaton Partners business division; Keefe, Bruyette & Woods, Inc.; Miller Buckfire & Co., LLC; and Century Securities Associates, Inc.; and in the United Kingdom and Europe through Stifel Nicolaus Europe Limited. The Company's broker-dealer affiliates provide securities brokerage, investment banking, trading, investment advisory, and related financial services to individual investors, professional money managers, businesses, and municipalities. Stifel Bank and Stifel Bank & Trust offer a full range of consumer and commercial lending solutions. Stifel Trust Company, N.A. and Stifel Trust Company Delaware, N.A. offer trust and related services. To learn more about Stifel, please visit the Company's website at [www.stifel.com](http://www.stifel.com).

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