

## FOR IMMEDIATE RELEASE

**ED MOLDAVER AND JAMES LEE NAMED TO  
FORBES' 2020 BEST-IN-STATE WEALTH ADVISORS LIST**

**ST. LOUIS, January 29, 2020** – Stifel Financial Corp. (NYSE: SF) today announced that Ed Moldaver and James Lee of the Moldaver Lee Group were named to *Forbes'* Best-In-State Wealth Advisors list for 2020.<sup>1</sup>

In the New York City Private Wealth category, Mr. Moldaver ranked No. 7 for the second straight year while Mr. Lee ranked No. 106 in the High Net Worth category – up from No. 148 in 2019.

The list spotlights more than 4,000 top-performing advisors selected from a pool of 32,000. Advisors were nominated by their firms then researched, interviewed, and assigned rankings within their respective states.

“We are honored and grateful that *Forbes* has recognized our practice on this year’s Best-In-State Wealth Advisors list,” said Mr. Moldaver, founding partner of the Moldaver Lee Group. “Albert Einstein once said, ‘The only source of knowledge is experience,’ and I’ve taken this to heart in building this team, which now has more than 200 years of combined industry experience. Each team member specializes in a separate and specific aspect of the wealth management process at a granular level, and this enables us to deliver the comprehensive advice our highly sophisticated clients need.”

Added Mr. Lee, “Excellence is never an accident. It is always the result of high intention, sincere effort, and intelligent execution. Over the last year and a half, Ed expanded the tremendous team he built over 20 years with a few more seasoned industry veterans. We are delighted to have Roger Saks (24 years of experience), J.P. Bartolomeo (26 years of experience), Michael Amato (29 years of experience), and Michael White (24 years of experience) to help us in our growing practice. We are grateful for each member’s contributions to our overall success.”

One of Stifel’s leading wealth management teams, the Moldaver Lee Group consists of nine 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 preservation 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.

Throughout his career, Mr. Moldaver has appeared in the following rankings:

- *Forbes'* Best-In-State Wealth Advisors – 2020 (No. 7), 2019 (No. 7), and 2018 (No. 15)<sup>1</sup>
- *Forbes'* America’s Top Wealth Advisors – 2019 (No. 34) and 2018 (No. 41)<sup>1</sup>
- *Barron’s* Top 100 Financial Advisors in America – 2019 (No. 19) 2018 (No. 29), 2017 (No. 30), and 2012 (No. 86)<sup>3</sup>
- *Barron’s* Top 1,200 Advisors – 2019 (No. 8) and 2018 (No. 12)<sup>4</sup>
- *Barron’s* America’s Top 1,000 Advisors – 2012 (No. 1 in the state of New Jersey), 2011 (No. 5), and 2010 (No. 10)<sup>5</sup>

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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 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.moldaverlee.com](http://www.moldaverlee.com).

<sup>1</sup> Forbes "Best-In-State Wealth Advisors," January 16, 2020, February 21, 2019, and February 15, 2018.

<sup>2</sup> *Forbes* "America's Top Wealth Advisors," September 11, 2019, and September 12, 2018. Rankings are based on the opinions of SHOOK Research, LLC, and were selected from a pool of over 30,000 nominations in 2019 and 25,000 nominations in 2018.

Advisors in the Best-In-State Wealth Advisors and America's Top Wealth Advisors lists 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.

<sup>3</sup> *Barron's* "Top 100 Financial 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>4</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>5</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 Advisors, and Top 1,200 Advisors lists 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.

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## **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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**For further information,  
contact Lynda Hofstetter  
(314) 342-2000**