

## FOR IMMEDIATE RELEASE

**ED MOLDAVER AND JAMES LEE NAMED TO  
FORBES' 2019 BEST-IN-STATE WEALTH ADVISORS LIST**

**ST. LOUIS, February 27, 2019** – Stifel Financial Corp. (NYSE: SF) today announced that Ed Moldaver and James Lee of the Moldaver Paterson & Lee Group were named to *Forbes'* Best-In-State Wealth Advisors list for 2019.<sup>1</sup>

In the New York City Private Wealth category, Mr. Moldaver ranked No. 7 – up from No. 15 in 2018 – while Mr. Lee ranked No. 148 in his first appearance on the list.

The list spotlights more than 3,400 top-performing advisors selected from a pool of nearly 30,000. 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 Paterson & Lee Group. “There’s an old proverb, ‘Even though you know a thousand things, ask the person who knows one,’ and I’ve taken this to heart in building this team. Our group is successful in part because each member specializes in his or her own 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, “Ed has assembled a tremendous team, and together, we believe that success is best when it’s shared. Being named to this prestigious list is a reflection of our unrelenting client focus and the hard work each one of us puts in every day. I’m proud to be a part of this team and grateful for each member’s contributions to our overall success.”

The Moldaver Paterson & Lee Group is one of Stifel’s leading wealth management teams. In addition to Messrs. Moldaver and Lee, it also includes former New York Governor David A. Paterson 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. “Stifel affords our team the ability to be plugged into a vast firm infrastructure, while maintaining the integrity and the independent client-driven process of the team,” Mr. Moldaver added.

Previously, Mr. Moldaver ranked No. 30 on Barron’s Top 100 Financial Advisors in America.<sup>2</sup> He was also named the No. 1 financial advisor in the state of New Jersey in *Barron’s* annual list of America’s Top 1,000 Advisors: 2012 State-by-State and made *Barron’s* 2012 list of America’s Top 100 Financial Advisors.<sup>3</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> 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 (over 21,000 in 2018). 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.

<sup>2</sup> *Barron's* "Top 100 Advisors," April 17, 2017, as identified by *Barron's* magazine, using quantitative and qualitative criteria and selected from a pool of over 400 qualified nominees.

<sup>3</sup> *Barron's* "Top 1,000 Advisors," February 20, 2012, 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 and Top 1,000 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.

### **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**