



Introducing the Stifel Charitable Legacy Gift Fund

► *Have You Thought About Your Charitable Legacy?*

Often, individuals who do not have children, have financially secure children, or hold strong charitable values would choose to create a long-term giving plan if only they knew it was possible.

One option you might want to consider is a **Stifel Charitable Legacy Gift Fund**.



The Stifel Legacy Gift Fund creates a stream of income for the causes you choose for the term you designate. This gift can be funded by an estate gift, an IRA or retirement plan beneficiary designation, a charitable remainder trust beneficiary, or a donor-advised fund beneficiary.

You can even fund your Stifel Legacy Gift Fund with qualified charitable distributions (QCDs) from your IRA during your lifetime.

Your family and friends can contribute to your Stifel Legacy Gift Fund as a memorial or honorarium.

Each Stifel Legacy Gift Fund is tailored to your charitable goals.



You can designate qualified nonprofits, located anywhere in the United States or internationally, to receive annual grants as an ongoing sustaining gift, an income stream spread over a term of five to 25 years, ongoing like an endowment, or as an outright distribution.

Based on the term chosen, grants will be made annually based on the fund's value on December 31 of the previous year. Ongoing funds will generally spend 5% of the fund's year-end value without reducing the initial principal amount. The term of years over which your fund will distribute amounts is based on an annual calculation of the year-end value spread out over the remaining term.



The annual grants will be made in the unique, personal, name of your choosing. Stifel Charitable Inc. will monitor each grant to ensure the receiving organization uses the dollars in accordance with your intent.

Once your Legacy Gift Fund is established, you can update your fund annually, at no cost, to reflect any changes in your charitable beneficiaries.

The Stifel Legacy Gift Fund provides you with a lasting solution for your charitable giving goals.

For more information, contact your Stifel Financial Advisor.

Stifel Legacy Gift Funds are handled by Stifel Charitable Inc., which is a 501(c)(3) non-profit organization. Stifel Financial Corp. companies, including Stifel, Nicolaus & Company, Incorporated, Stifel Bank, and Stifel Trust Company, N.A., provide services to Stifel Charitable Inc. Stifel does not provide legal or tax advice. You should consult with your legal and tax advisors regarding your particular situation.