

STIFEL

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I am a financial advisor, primarily for a select group of individuals, who, among other things, aspire to a work-optional lifestyle. So I have developed and refined a process that I believe helps put every piece of the financial puzzle together for my clients.

One piece to the puzzle is helping you invest in a tax-efficient manner. Having access to the municipal bond market can help us work toward that.

CALL ME TODAY AND FIND OUT THE DETAILS

(916) 774-3721

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Stifel does not provide tax or legal advice. You should consult with your tax or legal advisor regarding your particular situation.

Stifel Repeats in 2016 as **#1 California Municipal Bond Underwriter**

The following are the top 10 municipal managing underwriters in California

Firm	Rank	Number of Issues	Par (\$Mils)
Stifel	1	270	6,479.90
Piper Jaffray & Co.	2	99	3,230.40
RBC Capital Markets	3	72	3,443.90
Citi	4	59	6,825.70
Raymond James	5	58	1,792.60
Hilltop Securities	6	51	920.70
Bank of America Merrill Lynch	7	45	6,439.70
Morgan Stanley	8	44	3,744.20
Wells Fargo & Co.	9	32	3,182.60
Barclays	10	25	3,472.60

Source: Thomson Reuters, 2016, ranked by number of issues, negotiated transactions only

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Investing involves risk, including the possible loss of the principal invested.

Income from particular municipal bond issues may or may not be subject to state and alternative minimum taxes. Capital gains tax may apply if sold prior to maturity.

CA Insurance License No. 0D74209

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