

STIFEL | Investment Services Since 1890

Enjoy Today, Prepare for Tomorrow

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Paul Patros, CRPC® Vice President/Investments, and his Stifel team specialize in Wealth Management.

Helping families manage their wealth includes more than giving investment advice. Paul focuses on helping families with investment planning, asset management, and preparing and navigating through all of the financial aspects of life.

No client request is too big or too small. If it's important to the client, it's important to Paul and his team. The team works not only with the client and their family, but also with the client's accountant and attorney. Working with the client's

accountant, they are able to address tax efficient strategies throughout the year, and with the client's estate planning attorney, they coordinate to help strategize and assemble estate plans.

At Stifel, Paul and his team have many resources available to create a plan of action to help preserve and potentially grow your wealth. Paul can be reached by calling (608) 785-1727 or via e-mail at paul.patros@stifel.com (<mailto:paul.patros@stifel.com?subject=Website%20contact>).

Check out Paul's monthly [Retirement Strategies](http://paulmpatros.planningwise.com/?C=6687941) (<http://paulmpatros.planningwise.com/?C=6687941>) Newsletter.

Our Team (<http://www.patroswealthmanagement.com/agents.cfm>)

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

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