The Weiner Wealth Management Group

Helping you pursue
your financial goals.

125 YEARS 1890 – 2015

STIFEL

STIFEL | The Weiner Wealth Management Group

Our mission is to guide our clients in their quest to preserve and grow their assets over multiple generations by providing sound advice, customized investment strategies, and concierge-level service.

www.weinerwealthmanagement.com

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Debra Weiner, AAMS®

Senior Vice President/Investments

Debra Weiner has more than 30 years of investment industry experience, including 25 with Stifel and Ryan Beck & Co., which was acquired by Stifel in 2007. A member of Stifel's Chairman's Council, the firm's top-producing financial advisors, she personally oversees the management of more than $300 million of assets for individual and institutional clients.

Debra graduated with honors from the University of Massachusetts at Amherst with a degree in economics. She holds Series 7 and 65 licenses from the Financial Industry Regulatory Authority (FINRA), life, health, and variable insurance licenses, and the Accredited Asset Management Specialist™ certification.

Ms. Weiner is a past President of the Westchester Jewish Council and was the honoree of the Council's gala in 2006. She is a past President of Bet Am Shalom Synagogue in White Plains, New York, where she also served as the Ritual Chair for eight years and was the 1999 recipient of the Generation-to-Generation award from the New York Jewish Reconstructionist Federation. Ms. Weiner currently serves as the Government Relations Chair for UJA Federation in Westchester and serves on the UJA Federation/Westchester Program Services Cabinet, as well as the Business and Professional Board for which she is the 2015 honoree. She currently chairs the Advisory Committee for the Westchester Jewish Council and serves on the executive committee.

Debra has spoken in the past at public investment forums on topics including asset management and allocation, tax-advantaged investing, and issues surrounding estate and pension planning.

David Weiner

Senior Vice President/Investments

A 30-year investment industry veteran, David joined Stifel in 2014 to form The Weiner Wealth Management Group with his wife and business partner, Debra Weiner.

Prior to joining Stifel, David worked at Chrome Capital Management, LLC, a registered investment advisor he founded. Prior to that, he served as a Managing Director at RBC Capital Markets, where he ran the equity swap desk and marketed equity derivatives to RBC's corporate clients. Prior to that, Mr. Weiner was a Managing Director and U.S. head of derivatives at Credit Agricole Lazard Financial Products (CALFP), a joint venture between Credit Agricole Bank and Lazard Freres. Prior to CALFP, Mr. Weiner held various equity and fixed income derivative positions at UBS (and its predecessor firms), Deutsche Bank, and Lehman Brothers.

David began his career in the actuarial field. He holds a B.S. in Economics from the State University of New York at Albany.

Jessica Lang

Registered Client Service Associate

Jessica has more than 16 years of industry experience, including 13 years working with Debbie at Stifel and Ryan Beck & Co., which was acquired by Stifel in 2007. Jesse holds a Series 7 license from FINRA and is the group's dedicated Registered Client Service Associate. Jesse is detail-oriented, has terrific organizational skills, and is involved in many aspects of the client service experience. As a result, she is able to anticipate client needs, solve problems, and follow through to provide exceptional client service. When not in the office, you can often find her rooting for the Yankees or the Jets, depending on the time of year.

Wealth Management Services

Our services cover all areas of financial management, from investment and retirement planning, to risk management strategies and issues surrounding estate planning. We specialize in helping our clients develop a comprehensive, cohesive financial strategy that fits their unique needs and enables them to pursue both short- and long-term strategies.

Financial & Wealth Planning	Estate Planning	Retirement Planning	College Planning	Professional Money Management	Insurance & Liability Planning
Asset Allocation Analysis	Estate Plan Analysis	Retirement Income Planning	529 College Savings Plan	Fee-Based Advisory Programs	Business Owner Needs
Comprehensive Financial Planning	Charitable Giving	Traditional & Roth IRAs	Education Savings Accounts	Access to Professional Money Managers	Disability Insurance
Understanding Social Security	Beneficiary Review	IRA Rollovers & Distributions	UGMA/UTMA Accounts	Quarterly Performance Reports	Life Insurance
Tax Planning	Gifting & Estate Tax Planning	Retirement Funding Analysis	College Funding Analysis		Long-Term Care Insurance

Corporate Executive Services	Business Succession Planning	Cash Management	Retirement Plans for Business	Investment Banking	Bank & Trust Services
Cashless Stock Options Exercise	Life Insurance Needs	Check Writing	Choosing an Appropriate Plan	Public Offerings & Capital Raising	Mortgage Lending
Control & Restricted Stock Transactions	Buy-Sell Agreements	Debit MasterCard®	Reviewing an Existing Plan	Financial Advisory	Securities-Based Lending
Rule 10b5-1 Plans	Estate Planning Considerations	Bill Payment Services	Choosing a Plan Provider	Mergers & Acquisitions	VISA® Credit Cards
	Key Person Insurance	Stifel Access (online account access)	Selecting a Third-Party Administrator	Municipal Finance	Trust Management & Administration

Stifel does not offer legal or tax advice. You should consult with your legal and tax advisors regarding your particular situation.

Residential mortgage lending services for clients of Stifel, Nicolaus & Company, Incorporated are performed exclusively by Stifel Bank & Trust. The financial advisors of Stifel, Nicolaus & Company, Incorporated do not offer mortgage loans, provide mortgage loan information, or accept residential mortgage loan applications. Stifel Bank & Trust, Member FDIC, Equal Housing Lender, NMLS# 375103, is affiliated with Stifel, Nicolaus & Company, Incorporated, Member SIPC & NYSE. Unless otherwise specified, references to Stifel may mean Stifel Financial Corp. and/or any of its wholly owned subsidiaries, including Stifel, Nicolaus & Company, Incorporated, Member SIPC & NYSE, and Stifel Bank & Trust, Member FDIC. Unless otherwise specified, products purchased from or held by Stifel are not insured by the FDIC, are not deposits or other obligations of Stifel Bank & Trust or its affiliates, are not guaranteed by Stifel Bank & Trust or its affiliates, and are subject to investment risk, including possible loss of the principal.

Trust services are provided by Stifel Trust Company, N.A., a wholly owned subsidiary of Stifel Financial Corp. and affiliate of Stifel, Nicolaus & Company, Incorporated. Unless otherwise specified, products purchased from or held by Stifel Trust Company, N.A. are not insured by the FDIC or any other government agency, are not deposits or other obligations of Stifel Trust Company, N.A., are not guaranteed by Stifel Trust Company, N.A., and are subject to investment risks, including possible loss of the principal invested.

About Stifel

As Stifel financial advisors, The Weiner Wealth Management Group has the support of and access to the deep resources of one of the nation's leading financial services firms. Our affiliation with Stifel enables us to maintain the independent thinking and entrepreneurial spirit essential for us to help our clients pursue their financial goals.

Stifel, Nicolaus & Company, Incorporated is a full-service securities brokerage, investment banking, trading, and investment advisory firm founded in 1890. The company is a registered investment adviser with the U.S. Securities and Exchange Commission.

Stifel is home to the industry's largest U.S. equity research platform. Our equity research has ranked in the top five in the StarMine Analyst Awards for nine consecutive years.

Our parent company, Stifel Financial Corp., has been publicly traded on the NYSE since 1983 (symbol – "SF") and was listed in Fortune magazine's 100 fastest growing companies in 2009 and 2010.

- Offices in 45 States and the District of Columbia
- Sixth largest full-service investment firm in the country in terms of number of financial advisors, with more than 2,000
- More than 6,200 associates
- More than $165 billion in client assets under management
- $2.2 billion of revenue in 2014 and $9.5 billion in total assets
- Headquartered in St. Louis
- Web Site: www.stifel.com

We strive to help all our clients with their wealth – by helping to accumulate it, by managing it, by helping to preserve it, and by transferring it to their heirs. That's why Stifel offers a suite of products and services to help address every client and every goal.

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