

# STIFEL, NICOLAUS & COMPANY, INCORPORATED

**Peter Contino, CFP®**

*Financial Advisor*

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Member SIPC and NYSE

**ONGOING MONITORING  
OF PERFORMANCE**

Our implementation will be measured against targets and, if needed, revised to seek improved performance and/or better adapt to changes in your life.

**IMPLEMENTATION**

With your approval, I will implement financial recommendations in coordination with other professionals as needed.

**DEVELOP & PRESENT  
PLAN ALTERNATIVES**

We will mutually review my financial recommendations, discuss your concerns, and revise as appropriate.

**ANALYSIS &  
EVALUATION**

I will assess your current situation and determine what can be done to help you better achieve your financial goals.

**THE DISCOVERY  
EXPERIENCE**

We will comprehensively discover your financial and life goals, risk tolerance, and asset inventory.

**RELATIONSHIP  
FOUNDATION**

I will clearly explain the planning process and what you can expect from our relationship.

**1**

**2**

**3**

**4**

**5**

**6**

**INVESTMENT PLANNING PROCESS**