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STIFEL CLOSES ACQUISITION OF CB RESOURCE AND FINANCE 500

Deal Bolsters Community Bank Platform with Complementary Analytics and CD Businesses

ST. LOUIS, AUGUST 1, 2024 – Stifel Financial Corp. (NYSE: SF) today announced the completion of its acquisition of community bank-focused sister companies CB Resource and Finance 500. Terms of the transaction were not disclosed.

“The health and viability of community banks is essential to economic growth,” said Stifel Chairman and CEO Ron Kruszewski. “Stifel is committed to providing community banks with the tools and support needed to build sustainable business models and effectively compete with larger institutions and we will continue advocating for a level playing field for banks of all sizes.”

CB Resource’s enterprise risk management, strategic planning, capital planning, and industry analytics database will expand Stifel’s existing suite of reporting and analytics that also features asset-liability management, bond accounting and safekeeping. Finance 500 brings a CD underwriting business that has raised more than \$200 billion for 1,200+ depository institutions over the last decade alone. The team will fully integrate into Stifel’s existing CD business, which placed \$22 billion in deposits in 2023. These combined forces will establish Stifel as a market leader in CD volume of originations.

“Through our strategic insight, advanced analytics, and capital markets acumen, Stifel has an incredible team of resources to provide community banks the tools they need to thrive,” said Brant McDuffie, Co-Head of Fixed Income Capital Markets at Stifel. “When it comes to value-added services, Stifel is second to none. This investment further demonstrates our continued commitment, showing beyond a doubt that Stifel does more for community banks.”

The acquisition of the Irvine, California-based companies, which was previously announced in March, is the latest move by Stifel to bolster its community bank platform. In 2022, the firm acquired the broker-dealer Vining Sparks, which had a deep and long-standing footprint in the community bank space. The move married the two companies’ balance sheet-focused approaches and added depth to Stifel’s industry-leading strategy and analytics teams.

The Fixed Income Capital Markets Group at Stifel offers a suite of products and services designed to help community banks, financial institutions, funds, insurance companies, credit unions, money managers, and state and local governments generate revenue, preserve wealth, and ultimately grow their businesses.

Stifel Company Information

Stifel Financial Corp. (NYSE: SF) is a financial services holding company headquartered in St. Louis, Missouri, that conducts its banking, securities, and financial services business through several wholly owned subsidiaries. Stifel’s broker-dealer clients are served in the United States

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