

Adam C. Morgens CFA

Adam is a Vice President in the Global Wealth Management division of Stifel Nicolaus & Co., Inc. (“Stifel”). Mr. Morgens joined Stifel in 2015 following Stifel’s acquisition of Barclays’s US Wealth and Investment Management Division. Mr. Morgens’s practice consists of assisting wealthy individuals and their families with managing their investments in the context of concentrated business ownership; issues of estate planning, progression, and multiple international jurisdictions. Mr. Morgens joined Barclays in 2013 after over eight years at Mitsubishi UFJ Securities USA’s Union Bank, N.A. division – formerly Union Bank of California, N.A. – where he held the title of Vice President. Working for Union Bank’s brokerage division, Mr. Morgens first began his career with a focus in fixed income trading and economic research for the Bank’s ultra-high net worth clientele and served in various advisory capacities throughout Union Bank’s Private Bank. He then transitioned to the Institutional Group to advise Union Bank’s Fortune 500 clients, non-profits, and foundations with the construction of core equity and fixed income portfolios. Mr. Morgens holds a BS in Investments and Financial Markets from the Gordon S. Marshall School of Business at the University of Southern California. He is also a CFA Charterholder and member of the CFA Society of Los Angeles.