Cadence Wealth Management
UBS Financial Services, Inc.

UBS

Forbes Best-in-State Wealth Management Team, 2023*

Who We Are

Your life has a rhythm at each stage. Establishing your career, raising a family, becoming an empty nester, enjoying retirement—each period of your life moves at a different pace and comes with its own challenges.

Our team, Cadence Wealth Management, provides consistent financial advice at every stage of your life—a steady cadence that helps you prepare for your future, even as your life is changing.

(top row, left to right):

Ileana Dominguez, CEPA®, CIMA®, CRPS®, CRPC®
Senior Vice President–Wealth Management
Senior Portfolio Manager–Portfolio Management Program

Jessica L. Kartzinel, CIMA®, CEPA®
Senior Vice President–Wealth Management
Wealth Advisor
Endowment and Foundation Consultant

Rolf Maile, CFP®, CIMA®, CRPC®
Senior Vice President–Wealth Management
Portfolio Manager–Portfolio Management Program

Stephen Hazel, CFP®, CIMA®, CRPC®
First Vice President–Wealth Management
Financial Advisor

Dannette M. Trivisonno
First Vice President–Wealth Management
Wealth Advisor
Portfolio Manager–Portfolio Management Program

(bottom row, left to right):

Jen Lee-Mitchell, CEPA®
Vice President–Wealth Management
Financial Advisor

Sandra Beltran
Client Associate

Justin Schnurstein, CFP®, CEPA®, CRPC®
Senior Wealth Strategy Associate, Planning Specialist

Malinda Maile
Registered Client Service Associate

Leonel Jacquez-Bojorquez
Client Associate

* The *Forbes* rating is compiled by Shook Research and awarded annually in January, based on information from a 12-month period ending March of the prior year. Eligibility is based on quantitative factors and is not necessarily related to the quality of the investment advice. For more information on third party rating methodologies, please visit ubs.com/us/en/designation-disclosures.html.

Our Approach

Building Your Financial Confidence

Our approach to helping alleviate your financial anxieties is to mitigate your risk. For your assets, this means trying to limit the volatility in your portfolio and the downside in difficult markets.

But mitigating risk is also about your broader financial life. We work with you to create a customized financial plan targeted to your goals that considers key issues like your retirement lifestyle, legacy objectives and insurance coverage. With a detailed plan to serve as your roadmap, you can feel more prepared as you make decisions, navigate challenges and enjoy life's opportunities.

Working with Your Family

Talking about money isn't always easy. You might worry that you don't have enough money—or could lose what you have saved. In addition, while your family's opinions, emotions and past experiences on this topic might differ, our team will provide an objective perspective to help you identify your common goals. By bridging the conversation among family members, we may be able to create greater alignment and move forward productively toward a shared financial future.

Helping You Manage Your Business

Business owners face unique challenges, because their professional objectives and decisions are often intertwined with their family's finances. In addition, business succession can further complicate the picture, as family dynamics might come into play.

We have the knowledge and experience to help you address your business issues, and we understand how they overlap with your personal financial life. We can also serve as an unbiased voice in family conversations and help you prepare for a business transition that seeks to preserve the integrity of your life's work.

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Our Disciplined Planning Process

Our consistent and continuous process is designed to help you meet your liquidity, longevity and legacy needs. We ask questions and listen closely in order to develop a tailored financial plan and customized portfolio that can help you meet your specific goals.

Discover

- Understand your financial goals, obstacles and preferences
- Gather documentation
- Open dialogues with your accountant and attorney if required

Propose

- Develop a personalized financial plan
- Design an investment portfolio
- Create a schedule for briefings and reviews

Implement

- Initiate the financial plan
- Phase in the investment recommendations
- Enroll in selected services
- Review forthcoming client statements

Track

- Monitor progress according to the plan[1]
- Adjust the plan and investments when needed
- Inform you, your accountant and your attorney of notable developments
- Help you navigate timely options and opportunities

Getting Started

Whether your life is speeding up or slowing down, we can help you establish a financial cadence that aligns with your goals.

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(702) 567-4196

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[1] We provide periodic monitoring of advisory accounts in accordance with the client's agreements with UBS. Unless separately agreed in writing, UBS does not manage client's brokerage account, and clients make the ultimate decision regarding the purchase or sale of investments.

Neither UBS Financial Services Inc. nor any of its employees provide tax or legal advice. You should consult with your personal tax or legal advisor regarding your personal circumstances.

As a firm providing wealth management services to clients, UBS Financial Services Inc. offers investment advisory services in its capacity as an SEC-registered investment adviser and brokerage services in its capacity as an SEC-registered broker-dealer. Investment advisory services and brokerage services are separate and distinct, differ in material ways and are governed by different laws and separate arrangements. It is important that clients understand the ways in which we conduct business, that they carefully read the agreements and disclosures that we provide to them about the products or services we offer. For more information, please review the PDF document at ubs.com/relationshipsummary.

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What makes us unique?

Focus

Our team limits the number of clients we accept, which allows us to spend more time working with you to help you achieve your individual goals.

Personalization

Our clients are individuals to us, each uniquely important. Our process emphasizes comprehensive financial planning and helps you make decisions that may lead to long-term financial success.

Communication

We have developed a service model that outlines the frequency, methods and level of contact. With ten team members available to assist you, accessibility is a priority.

Trust

Our team has a focus on client education and appreciation. We believe it is important to empower you with knowledge and express our appreciation for your trust.