James E. Condolff

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Executive Director
UBS Bank USA

Ultra High Net Worth Lending Origination Team

Jim joined UBS Bank USA in 2022 and currently serves as the Ultra High Net Worth Lending Originator for the Northeast region. In this role, Jim works with Advisors to identify lending opportunities among their high and ultra high net worth client base. Where suitable, he then analyzes available options and presents clients with a range of bespoke financing solutions, drawing from UBS' firmwide offering.

Jim has more than 20 years of experience working with Financial Advisors to deliver structured and complex credit solutions to their clients and family offices. He draws upon this experience to structure thoughtful financing options that address clients' needs and complement their overall wealth management objectives.

Education and personal information

Jim holds a Master of Business Administration in Finance with International Business Designation from Fordham University (Gabelli School of Business), and a Bachelor of Science in Business Administration with a Finance Concentration from Villanova University. Jim holds his Series 7, 63 and 66 securities licenses.

Outside of the office, Jim enjoys golf and cycling. He also serves as Treasurer and member of the Executive Committee and Board Of Directors for a community based not-for-profit foundation that provides support for the arts and sciences at a private school in Bronxville, NY.

He resides in Rye, New York.

Peter Carter is a Managing Director on the High Net Worth Lending team in the Banking Group of UBS Wealth Management Americas. He leads the Private Equity Partner Program as well as the Lending Referral Group, a platform of lenders with which UBS partners in specific asset classes including business loans, luxury asset financing and agricultural loans. He also leads new business build and major change initiatives. Most recently, he oversaw UBS' participation in the Paycheck Protection Program under the CARES Act. He was previously a senior banker at Credit Suisse and Merrill Lynch in both London and New York. Prior to becoming a banker, he served as a Commissioned Officer and helicopter pilot in the US Army. He has an MBA from the University of Chicago Booth School of Business and a BS degree from the US Military Academy.

2024 Cohort

LILLY KAUFMANN

DIRECTOR
UBS O'CONNOR
HEDGE FUND

Lilly is a Director with O'Connor Capital Solutions, based in New York, where she is responsible for the diligence, structuring, and execution of investments. Prior to joining O'Connor, Lilly was a member of the deal team at Ares Management's Real Estate platform, focused on the origination of real estate investments across multiple property types ranging from light transitional to mezzanine construction loans. Prior to Ares, Lilly was part of the Real Estate team at TPG Capital. Lilly started her career at Lord, Abbett & Co. and subsequently Barclays Capital, where she was responsible for fixed income trading and investments. She graduated from the University of Pennsylvania with a major in Economics and a minor in Statistics (Wharton). Lilly is currently the outgoing co-Chair of the CREFC Young Professionals Committee, a member of mPACT with the Mortgage Bankers Association, and a violinist with the United Nations Symphony.

https://www.linkedin.com/in/lillykaufmann

Senior Wealth Management Banker

Sheree Woods, CFP ®
Director
Senior Wealth Management Banker
UBS Bank USA

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Current role and areas of expertise

Sheree joined UBS Bank USA in 2016 and she is currently a Senior Wealth Management Banker covering the Atlanta Market, Atlanta PWM, Charlotte PWM, Southern Virginia and the Carolinas offices.

Leveraging her extensive background in relationship banking, Sheree is focused on providing Financial Advisors and their clients with a variety of banking and lending options, where suitable, to complement their overall wealth management objectives. By presenting both asset and liability management strategies, Sheree is able to highlight all that UBS Bank USA has to offer and ensure awareness of opportunities on both sides of the balance sheet.

Professional history

Sheree began her career in financial services in 1994. Prior to joining UBS, Sheree spent five years as a Private Banker at Morgan Stanley. Sheree has held positions as a Commercial Lender for BB&T and Wachovia. She also served as a Market Executive for Coastal Banking Company.

Education and personal information

In Sheree's role as a Senior Wealth Management Banker, she holds her the Series 7 and Series 66 securities licenses, CFP® and carries NMLS# 797777. Sheree earned her B.B.A. in Finance from Georgia Southern University.

Outside the office, Sheree stays active through gardening, tennis and boating. She also enjoys cooking, entertaining and gathering with friends and spending time with her two adult stepsons, Levi and Addison and daughters-in-law, Laura and Kylie. Sheree is an avid tennis player, participating in USTA, Ultimate, T2 and Atlanta Lawn Tennis Association where her team won the City Championship in 2016, divisional titles in 2017, 2018, and 2021 and were runners-up for the City Championship in 2019 and 2023.

Sheree resides in Sandy Springs, Georgia with her husband Kendall, a 2x IRONMAN and 12x 70.3 IRONMAN, and has fun crewing for his IRONMAN events. Sheree and Kendall also volunteer with the Kyle Pease Foundation, promoting success for young persons with disabilities by providing assistance to meet their individual needs through sports and competition.

Wealth Management Banker Contact

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IS2307043, Expiration: 11/30/2024

UBS

Andrew Mancini has over a decade of experience in commercial real estate (CRE) mortgage directly originating, structuring, and underwriting over $10 billion in new loans. Prior to joining UBS as CRE Originator, Andrew worked for the Overlook Capital Partners debt platform, sourcing and closing on value-add CRE transactions nationwide. Prior to this, Andrew founded ATM Capital LLC where he was responsible for origination, transaction management, and B-piece underwriting for stretch senior and mezzanine debt investments related to new conduit, bridge, and construction loans. Prior to forming ATM, he was a ratings analyst with the new issuance CMBS group at Moody’s Corporation. He also held credit analyst roles within the lending and structured product groups at SL Capital-CCRE, MC-Five Mile Capital, and Barclays.

Andrew holds an MSRE in Real Estate Finance and Investment from Fordham University and a BS in Finance from Seton Hall University.