UBS

Christopher B. McCullough

UBS Financial Services Inc.

Christopher B. McCullough
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Wealth Planning Strategist –
Wealth Planning & Trust
Consulting Team
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Backed by the global resources of UBS

160
years experience

51
countries worldwide

$3.3
trillon assets under management

Source: UBS, 2022

Chris is a Wealth Planning Strategist in our Mid Atlantic markets. In this capacity, Chris is responsible for providing Financial Advisors and their high net worth clients with unbiased, product neutral, advanced planning strategies, design and implementation. As an advanced financial planner, he provides expertise in the following areas:

- Estate and multi-generational planning
- Retirement income and cash flow analysis
- Business continuity and succession planning
- Retirement plans and employee benefits
- Risk and liability management planning
- Charitable giving strategies
- Executive compensation and benefit strategies
- Special Needs & Disability Planning

Utilizing the wealth planning framework, Chris aims to deliver the full breadth of UBS services to aid clients in achieving their wealth planning goals.

Past experience

Prior to joining UBS in 2022, Chris served as a Senior Trust Officer with the Goldman Sachs Trust Companies. In this capacity, Chris worked closely with high net worth families to plan and implement generational wealth transfer strategies.

Education and credentials

Chris holds a B.A in History from Gettysburg College and a J.D. and LL.M., Taxation, from Villanova University School of Law.

Life

Chris is an active member of the Philadelphia Estate Planning Counsel. He lives in Philadelphia with his wife and son.

Gregory L. Seltzer is an experienced transactional attorney who utilizes and combines his knowledge of legal, accounting, and business principles to provide comprehensive, practical, and creative business law services. He holds an MBA, is a Certified Public Accountant (currently inactive), and previously worked as an auditor and tax consultant for Ernst & Young, LLP.

He concentrates his practice on public and private merger and acquisition transactions, including private equity and venture capital financing transactions, securities offerings, and spin-out transactions.

Greg is a Practice Leader of the firm's Emerging Companies and Venture Capital Group. He represents entrepreneurs, startups and emerging companies in cutting-edge industries, including SaaS, virtual currency, biotech, mobile applications, and cloud-based technology, among others. He also represents venture capital firms, family office investors, and angel investors - allowing his practice to be informed by both perspectives. He co-founded and leads the firm's widely recognized accelerator program: Ballard Academy for Student Entrepreneurs (BASE).

Christopher A. Jones co-leads the Ballard Spahr’s Tax team. He advises clients on a wide range of federal, state, and local tax matters. His practice includes advising clients regarding the tax consequences of complex transactions and associated planning opportunities. Additionally, Chris assists clients in federal, state, and local tax audits and controversies, and has represented clients in administrative appeals and in court. He provides clients tax advice in labor and other litigation matters, including withholding tax and information reporting issues.

Chris also regularly counsels nonprofit organizations on a wide range of issues, including formation, federal and state compliance, unrelated business taxable income, and joint ventures. He co-leads the firm's Exempt Organizations and Tax Controversy teams and has represented nonprofit organizations in IRS exempt status, employment, and information reporting audits.

Chris Yost

Mid-Atlantic Regional Director at **Cantor Fitzgerald Asset Management***

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Chris Yost is a Divisional Director at Cantor Fitzgerald Asset Management, a global financial services firm and open architecture wholesale distribution company. CFC aims to leverage the strength of Cantor Fitzgerald to provide institutional solutions to the retail investor. Chris brings over 25 years of experience in the financial services and the alternative investment industry. Chris works directly with registered representatives and investment advisors covering all channels in the Mid-Atlantic territory.

From 2012-2015 Chris was a National Product Manager with Realty Capital Securities focusing on the Retail Centers of America & Phillips Edison REIT offerings.
From 2000-2012 Chris worked at Hartford/PLANCO where he held: Divisional Vice President Northern Division, Divisional Vice President Pacific Division, & Regional Vice President Georgia & South Carolina roles.

Chris Earned his Bachelors Degree from the University of Pittsburgh. Chris Currently holds FINRA Series 7, 65, 63, 26 & Real Estate licenses, as well as the CAIA Fundamentals in Alternatives designation.