



The Loewenthal Group

Together, we can find an answer



Advice. Beyond investing.

plan

access

save

borrow

grow

protect

give

It's the important things—our families, our values, the impact we have on others—that connect us. And although making sense of it all can be hard, asking the right questions can make things clearer. So when we talk to you about wealth management, we want to learn about the life questions that are on your mind. *Should I start my own business? Is it better to leave my kids everything? Or nothing? How do I set up a charitable fund? Will my family be ok when I'm gone?* **For these and other life's questions our team looks forward to helping you find the answers.**



Rod Loewenthal, CRPC®
Managing Director - Wealth Management

For more than 22 years, Rod has provided customized financial planning and portfolio management for his clients by working closely with them on wealth management and

wealth transition strategies. Prior to joining UBS in November 2017, he began his career as a Financial Advisor with Merrill Lynch in 1995.

Rod has distinguished himself with the senior portfolio manager designation, in addition to providing traditional advice and guidance, Rod can help clients pursue their objectives by building and managing personalized or defined strategies, which may incorporate individual stocks and bonds, model portfolios, and third-party investment strategies. Senior portfolio managers are provided a high degree of flexibility in constructing portfolios and selecting securities. When servicing clients through the firm's Investment Advisory Program, a senior portfolio manager may manage his strategies on a discretionary basis.

Rod earned his bachelor's degree with honors in history from the University of Michigan. He resides with his wife, Tracy, and their three children in Highland Park, Illinois. Barron's named Rod to its 2014, 2015, 2016 and 2017 America's Top 1,200 Financial Advisors list. He also appeared on Forbes' America's Top 250 Financial Advisors list in 2016 and 2017.



Kevin Kamholz, CFP®, CRPC®
First Vice President – Wealth Management

Kevin joined the financial services industry over 28 years ago, after beginning his career with the First National Bank of Chicago. Prior to joining UBS in November of 2017,

Kevin spent 20 years with Merrill Lynch as a Wealth Management Advisor and also served as a Trust and Estate Specialist.

Kevin's tenure with the Loewenthal Group has continued his experience in helping clients achieve their financial and legacy goals. Kevin specializes in comprehensive financial planning for high net worth individuals and their families, with a focus on detail and implementation. His expertise include: investment management, retirement cash flow planning, trust and wealth transfer, insurance planning, and charitable strategies.

Kevin is a graduate of Illinois State University where he received a Bachelor's Degree in Finance. He also holds an MBA in Finance from the Charles H. Kellstadt Graduate School of Business at DePaul University. Kevin has achieved and maintains the following professional designations:

-CFP® certificant, a designation awarded by the Certified Financial Planner Board of Standards, Inc.

-Chartered Advisor in Philanthropy® (CAP®)

-Chartered Retirement Planning CounselorSM (CRPC®)

Kevin and his wife have been married for over 20 years and reside in Western Springs with their two daughters. He enjoys all outdoor activities, coaching and playing sports, and spending time with his extended family.



Jeremy Wynes
Financial Advisor Associate

Jeremy joined UBS and the Loewenthal Group in 2018 after a decade offering professional advice and guidance at the intersection of public policy, politics and international affairs. Prior to joining UBS, Jeremy practiced law, held multiple high-level director roles for two of the country's premier foreign-policy advocacy organizations, and spent a year seeking election to the U.S. House of Representatives. Jeremy earned his bachelor's degree from Illinois State University in 2002 and his law degree from DePaul University College of Law in 2006. He resides in Highland Park, Illinois, with his wife, Lesley, and their three children.



Betsy Mason
Senior Wealth Strategy Associate

Prior to joining UBS in 2017, Betsy spent the majority of her 30-year career at Merrill Lynch coordinating all aspects of supervisory and administrative issues with senior branch management. Betsy joined The Loewenthal Group at Merrill Lynch in 2005, bringing her talent and a tremendous drive to strengthen all aspects of the client experience. She provides support in all phases of client service and client relationship management. Betsy resides in Lindenhurst, Illinois, with her husband, James, and their three daughters.



Justin McIntire
Senior Client Service Associate

Justin has over 10 years of financial services experience. Prior to joining UBS in 2017, he became a member of The Loewenthal Group at Merrill Lynch in 2006. He assists in the daily business activity of the team, with a focus on technological team support and helping clients develop their financial outlook. Justin provides personalized assistance to clients, with high-level problem-solving skills. He earned his bachelor's degree in political science from Capital University, in Columbus, Ohio, where he earned a varsity soccer letter three years in a row. He lives in Grayslake, Illinois, with his wife, Magdalena, and sons, Conor and Avery.



Danielle Landon, CFP®
Senior Client Service Associate

Danielle joined the Loewenthal Group in January 2018 but she is no stranger to UBS, previously working for a team in Plano, Texas since 2013. She began her career at Merrill Lynch in 2005 and in 2011 earned the CERTIFIED FINANCIAL PLANNER™ certification, which attests to her dedication to provide our clients with planning strategies that are developed according to their individual needs and goals.

Danielle received a Bachelor of Arts from Hardin Simmons University. In her free time she enjoys acting and spending time outside with her husband, Ryan, and their two dogs.

The Loewenthal Group

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For some of life's questions, you're not alone. Together we can find an answer.

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Advice. Beyond investing.

In today's world, you need to understand how all the pieces of your complex life can affect your pursuit of important financial goals. Let's talk about making a sensible plan designed to manage your wealth with your life in mind.

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