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Delivering Advice Beyond Investing

Pictured: *(seated, left to right)* John Rocco, Joe Matina, Maryellen Frank, *(standing, left to right)* Kaitlyn McDonald, Chris McKenna, Grace Damen, *(not pictured)* Robert Field

PERSONAL ATTENTION AND COMPREHENSIVE SOLUTIONS FROM THE WORLD'S LARGEST WEALTH MANAGER*.

For 150 years, UBS has been committed to harnessing global resources to help clients achieve wealth management goals. Based in Short Hills, New Jersey, with partners located in New York City, Connecticut, and Wall, New Jersey, the Matina Group of UBS Private Wealth Management is upholding that long-standing reputation by keeping wealth management at the core of its business.

"We view wealth management as a cycle with three main components: financial planning, investment management, and trusts and estates," says Managing Director – Wealth Management and Private Wealth Advisor Joseph Matina. "Our time-tested process ties these three areas together."

CONNECTING RESOURCES AND CLIENTS

With extensive experience and unique talents that are essential to serving the needs of high net worth families—the four partners and team have backgrounds in investment management, private banking, lending, and institutional trading—this Private Wealth Management team brings a wealth of experience and intellectual capital to portfolio design.

"We bring resources, no matter where they sit, to clients and collaborate to make decisions with them," says Matina, noting advisors offer the best available solutions from a broad range of UBS and third-party products and platforms. "We are direct and transparent when making investment recommendations, which helps keep fees lower and helps clients understand what they truly own."

WATCHING OUT FOR CLIENTS

At the Matina Group, client relationships are often multigenerational. Advice and service is based on intimate, trusting relationships centered on an understanding of each client's and their family's vision, including retirement, legacy, philanthropic, and investment goals.

"We get to know them and their families, what their wishes and dreams are, and what the money means to them," says Matina. "Clients typically view us as a virtual family office. There are very few financial decisions for which they don't seek our opinion."

Partner Maryellen Frank notes that Matina was named to the Barron's 2015 Top 1,200 Financial Advisors and the Financial Times 2015 Top 400 Advisors in America. "We feel this recognition is a reflection of our commitment to delivering excellent investment management alongside an outstanding client experience," she says.

"The markets can be turbulent," Matina adds, "but clients receive a sense of assurance and comfort working with us. As a team, we have experienced multiple market cycles, are able to design well-positioned portfolios, and know the importance of being accessible to our clients. We create a simple, systematic way to invest while enjoying personalized advice and guidance as well as professional investment management within a reasonable fee framework."

UBS

The Matina Group of UBS Financial Services Inc. is based at 51 John F. Kennedy Parkway, Suite 240, in Short Hills, NJ 07078. For more information, call **877-452-4344** or visit **financialservicesinc.ubs.com/team/matinagroup**.

*Scorpio Partnership Private Banking Benchmark 2015 12-month period ending 12/31/14.