Advice for generations

Princeton Investment Consulting

Private Wealth Management

At Princeton Investment Consulting, we understand that when it comes to helping our clients—generations of successful families, business owners, executives and their organizations, build, preserve and transition their wealth, tactical expertise is not enough. You should expect critical thinking, solutions, execution, and above all, a team that is dedicated to providing the advice and service you deserve. As members of the exclusive UBS Private Wealth Management division, we access opportunities and expertise across our firm and around the globe to help us deliver on that goal every day.

Create an integrated plan for complex wealth

Our advice offers you the structured approach of a financial plan with customized, risk-managed investment solutions. We have the capabilities to address and execute on each of your most important priorities and concerns—anywhere from sourcing new capital to establishing a family wealth transfer plan for exiting your lifelong business. Because of our experience working with institutional clients in a fiduciary capacity, we have a depth of planning knowledge to help senior executives get the most from their equity incentive program by integrating it with their overall wealth management strategy.

Liquidity. Longevity. Legacy.
Our process starts with questions and a discussion that help us focus on what's really important to you. Then, we can help you organize your financial life into three key strategies: **Liquidity**—to help provide cash flow for short-term expenses, **Longevity**—for longer-term needs and **Legacy**—for needs that go beyond your own.

Timeframes may vary. Strategies are subject to individual client goals, objectives, and suitability. This approach is not a promise or guarantees that wealth, or any financial results, can or will be achieved.

Access all of UBS Private Wealth Management

Within the distinguished UBS Private Wealth Management division, our team accesses the full depth and breadth of UBS investment platforms, advanced strategies and global thought leadership on your behalf.We take a collaborative approach to working with you, often consulting with UBS experts from:

Family and Philanthropy Advisory services. Our team also has extensive expertise with family wealth and the issues it can raise—from generational transfer of businesses and estate planning strategies to liquidity management, family foundations and philanthropy.

Portfolio Advisory Group. This team provides us with advanced quantitative analysis and proprietary research for a dynamic asset allocation designed to address your specific needs.

Sustainable and impact investing. Some of our clients choose portfolios that incorporate social, environmental and governance factors into investment decisions. Through impact investing, a sustainable approach, we help you use your wealth to contribute toward a more renewable society—as well as a potentially profitable portfolio.

Global research. By drawing upon our investment analysis and the global body of thought leadership and market insight of our Chief Investment Office (CIO), we help ensure you receive the firm's best strategic and tactical allocation guidance.

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Tailored financing solutions. Innovative credit and lending solutions.

Strategic philanthropy. We work with a dedicated team of philanthropy experts to help us address your current charitable goals, engage the next generation and design a strategy for creating real impact.

Plan the future. Work your plan.
Today, more than ever you need the right team by your side to provide solid information, clear direction and a plan that can help position you, your family and your business for continued success and the future you envision. We look forward to beginning this important conversation.

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