Delivering impactful solutions

CGF Wealth Management

Private Wealth Management

At CGF Wealth Management, we are well versed in working with successful individuals and families. Whether you are a C-suite executive, corporate lawyer or multigenerational family, our team of seasoned experts can help advise and guide you on a wide range of financial priorities—from portfolio management, to banking and lending, to legacy planning.

Many of our clients, while successful and knowledgeable, don't have the time or expertise to effectively manage their wealth. This is where we can step in, employing a collaborative approach to bring you highly customized and comprehensive wealth solutions. You can count on us to take the time to understand your circumstances and your personal and professional goals. Only then do we work with you to develop a plan for your financial life that aligns with what's most important to you. And because we understand that life brings unexpected changes and opportunities, your financial plan is designed to evolve over time, along with your goals and priorities.

Our team by the numbers

$1.3 **billion assets** under management (as of August 2021)

Approx. 390 client relationships

Supported by the 150**-year heritage** of UBS, a global leader in wealth management

Meeting your unique needs

Comprehensive investment management
Our team, collectively, has a wealth of investment management experience. As a sign of the trust that our clients place in us, a large percentage of them give us full discretion to manage their investments. We draw on UBS's extensive resources and thought leadership to bring you innovative investment recommendations, and selectively employ third-party managers—all with the goal of finding the right combination of investments for your unique needs and circumstances. We also assist with your banking, liquidity and lending needs to help ensure that all aspects of your financial life work together as part of a holistic and comprehensive plan.

Optimizing your legacy
Our team has decades of experience assisting multigenerational families with their often complex needs. We work with you to see that all necessary documentation is in place and coordinate closely with your lawyers and accountants to ensure that the resulting family legacy and estate plan are thoughtfully constructed and take into account the priorities and wishes of both the current—the next—generation.

Spearheading a plan for your future
We understand that advanced planning is an integral part of a well thought-out financial roadmap. We can guide you through the process, working with you to craft a plan that aligns with your needs and challenges while allowing you to take advantage of unexpected opportunities and life changes. We maintain an extensive network of trusted contacts, including attorneys and accountants, who can help round out your existing team. As part of the planning process, we can also draw on our team's insurance and retirement

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planning experience, as well as the highly specialized resources of UBS's Advanced Planning Group—all with the goal of protecting and preserving what you have worked hard to achieve.

A collaborative approach
We aim to develop collaborative relationships with our clients, many of whom have, over time, gained a level of comfort with us that is rooted in trust and transparency. Our team is accustomed to working with highly successful executives and individuals, and we pride ourselves on being responsive to your needs and thinking ahead to anticipate opportunities and challenges before they arise.

The strength of a market leader

As part of Private Wealth Management, an elite group within UBS that is wholly focused on clients of substantial means, we have access to a broad and deep network of expertise, intellectual capital and best practices. Our team is adept at bringing this full suite of capabilities to you when you need them.

Let's begin the conversation.