UBS

Northern Tier Wealth Management

Celebrating our one year anniversary

It takes great people to build an exceptional wealth management team. That is why we are excited and proud to celebrate our **one-year anniversary** of joining UBS, a world-leading global wealth manager.

A year ago, we decided to embark on an incredible journey to build a wealth advisory group based upon our core principles:

Client-First. Our clients are at the center of everything we do. We put their interests first and operate with a fiduciary mindset to deliver recommendations that are tailored to their individual needs.

Personalized advice. No matter the level of complexity, we have the expertise and experience to advise our clients. We believe everyone deserves great advice.

Exceptional service. Our clients have high expectations, and so do we. We make their lives easier by providing a premium level of service.

Long before we joined UBS, we were already providing comprehensive wealth management advice with care and diligence. As our clients well know, moving from one financial institution to another causes reflection on the personal value and trust with your advisor. Our continued focus on clients through education and planning, combined with our commitment to these principles and the resources available to us, helps to make sure that a lifetime of wealth creation creates a legacy that endures.

We were proud to join UBS and form **Northern Tier Wealth Management** and are excited to celebrate our accomplishments in the team's first year.

We would like to give a huge thank you to our clients, partners, friends, and family members for trusting in us and joining us on this journey.

We look forward to starting a dialogue with those clients we have yet to meet and provide the same guidance and advice we proudly provide to our current clients and their families.

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