Megan MacGowan, CFA, CFP®
Alison McEntee

Preserving, enhancing and perpetuating your wealth

Our services

Financial planning. We help to define your long-term goals and objectives, analyze your current situation, and make recommendations to help ensure your goals will be met.

Retirement, tax and estate planning strategies. Having a comprehensive understanding of your retirement lifestyle, tax liability and desired legacy will help ensure these events are handled correctly and efficiently.

Education funding. For those who want to help prepare for higher education expenses for a child or grandchild, we assist in education funding solutions. We help in starting a college savings plan with the option to make automatic, systematic contributions to the plan.

Asset allocation modeling. We provide customized asset allocation based on risk and objectives. Your suitable asset allocation is determined during our process and developed with the goal of providing the maximum amount of return for the least amount of risk you are willing to take.

Portfolio management and global research. We consistently track and analyze our managers' performance to select the best vehicles for your investment goals. We integrate and leverage the broad array of global financial resources at our command to help you manage your wealth.

Rebalancing and risk management. Rebalancing your overall portfolio serves as a risk reduction strategy. Portfolios are rebalanced at least annually, and oftentimes quarterly depending on the markets.

Regular client meetings. As part of our service, we have regular scheduled contact with meaningful conversations. Meetings are personalized, informal and high quality. We strive to be proactive and maintain consistent communication with you.

Accountant and attorney relationships. To streamline communication and have a broader understanding each client's situation, we establish relationships with accountants and attorneys. We can prepare an annual tax package for your accountant, to simplify your life during tax season. We will also connect with any other pertinent life advisors to enhance your overall experience.

Life documents review. To ensure that all appropriate documents have been created and are in good order, we review all life documents, including wills, trust documents and powers of attorney.

Insurance review. As needs and circumstances continuously change, we recommend reviewing policies every two years to ensure you have the appropriate coverage.

Banking and lending. UBS offers a range of banking and lending services for your everyday needs. Each solution is designed to work together with your wealth management plans so you can be better prepared for expected and unexpected expenses.

UBS Online Services (OLS). Stay connected with your finances—manage cash, pay bills, check balances and transfer funds among accounts. You can also view previous statements and tap into insights from Wealth Management Research.

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