Managing your financial picture. Simplifying your life.

Long River Wealth Management

You've built a strong foundation, but there may be more you wish to achieve. It can be hard to know whether your goals are within reach.

We are an experienced team of financial advisors and skilled support staff who can help you find the answers to your questions. Our independent guidance is tailored to you and backed by the resources of UBS, one of the world's largest wealth managers. From financial planning to risk management to investment strategy, we aim to make all aspects of your financial situation work in harmony. Our comprehensive and empathetic approach can help you address the uncertainties, face the future with confidence—and simplify your life.

How we work with you

A planning-based approach
Our understanding of your life and goals forms the basis of every client relationship. We take the time to get to know you and your family, discover and prioritize your objectives and create a plan designed to achieve them.
Watch our video *"The plan comes first."*

Working across generations
We are a multigenerational team by design, and we are committed to helping each generation of your family—today and in the future. Count on us to work with your children and grandchildren to address their needs at every stage.
Watch our video *"The whole client family."*

Simplifying your life
Our entire team concentrates its efforts on excellent client service. Whether you need help with bill paying, paperwork, managing your retirement plan distributions or any other financial matters, our team of five financial advisors and seven supporting professionals will treat you as our highest priority.
Watch our video *"Simplifying your life."*

Sharing the same investment philosophy
We offer discretionary investment management based on a disciplined process and years of experience. Our investment committee informs the work of our portfolio management team, who will craft your customized strategy. And our personal investments share the same philosophy as yours, ensuring alignment of interests.
Watch our video *"Investing alongside you."*

The proof is in our numbers

$2 **billion** AUM

30 **years** in business as a team

12 investment **professionals**

Backed by the strength of UBS

$3.6 **trillion** AUM

51 countries

one of the **world's largest wealth managers**[1]

We want to help you on your financial journey. Talk to us about how we can help simplify your life.

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Meet our team

Keeping you informed
As investors, each of us can be our own worst enemy. As advisors, we seek to save our clients from making common mistakes. In addition to regular one-on-one interaction, we offer a range of regular insights including weekly and quarterly commentaries, a quarterly market update call, and video and *podcast series* designed to help you think through the issues and make good decisions.

Everywhere and right next to you
Our team makes independent investment decisions, yet offers access to all of UBS's global capabilities. Our close relationships across the firm allow us to connect you with resources including:

- Banking and Lending Solutions
- Chief Investment Office
- Alternative Investments
- Philanthropy Services
- Family Office Solutions Group
- Advanced Planning Group: Advice on estate planning strategies, tax minimization

Watch our video *"The best advisors."*

Doing well by doing good
From a portfolio standpoint, we recognize the importance of aligning investments with values. Whether you are interested in excluding certain investments from your portfolio, integrating consideration of environmental, social and governance factors, or making a difference through impact investing, our team offers comprehensive sustainable investment guidance and solutions.

A culture of compassion
We're proud of our work ethic, integrity, diversity of skills and deep client connections. We also believe in making a positive contribution to our communities and our world. In addition to serving endowments, foundations and othwer nonprofit organizations professionally, we commit our personal time, serving on the boards of several nonprofit organizations. Watch our video *"It's all about the culture."*

Long River team members hold leadership positions at organizations that include:
- Hartford Foundation for Public Giving
- Children's Educational Opportunity Foundation of CT
- World Affairs Council of Connecticut
- Bushnell Center for Performing Arts
- Opera San Miguel
- Hartford Stage Company
- Estate Business Planning Council of Hartford
- Trinity College, Barberi Endowment
- Stonington Historical Society

[1] Scorpio Partnership's "Global Private Banking Benchmark 2018" rank of global wealth managers by assets under management.

Neither UBS Financial Services Inc. nor any of its employees provide tax or legal advice. You should consult with your personal tax or legal advisor regarding your personal circumstances.

As a firm providing wealth management services to clients, UBS Financial Services Inc. offers investment advisory services in its capacity as an SEC-registered investment adviser and brokerage services in its capacity as an SEC-registered broker-dealer. Investment advisory services and brokerage services are separate and distinct, differ in material ways and are governed by different laws and separate arrangements. It is important that you understand the ways in which we conduct business, and that you carefully read the agreements and disclosures that we provide to you about the products or services we offer. For more information, please review the client relationship summary provided at **ubs.com/relationshipsummary**, or ask your UBS Financial Advisor for a copy.