UBS

Mallah Financial Group

Pursuing the goals that matter most

It's the important things—family, our values, the impact we have on other people—that unite us. And although making sense of it all can be hard, asking the right questions can make things a little clearer. After all, to make the right choices, you need to ask the right questions. When it comes to answering your questions, we can help you find the best way forward.

We'll discuss each area of your financial life, but also look beyond your investing needs to understand what's important to you and the concerns that keep you up at night. Using these insights, we'll put our knowledge and experience to work, delivering the advice you need to feel confident about pursuing the goals that matter most to you.

Your goals

Addressing what matters most to you

Protecting those you love—today and tomorrow
How much insurance is enough insurance? If you're now caring for adult children and aging parents, the costs today can be more than you expected. We'll work with our insurance specialists to help you determine whether you have the right coverage. We can also recommend strategies that can help protect your nest egg, even if unexpected events occur.

Living comfortably in retirement
You could be retired for 30 years. How can you make your retirement funds last? Which accounts should you tap first? The longer you spend in retirement, the greater the impact these decisions can have on your lifestyle. We'll work together to help ensure you're financially prepared to live comfortably.

Setting a new course during periods of life change
Life often presents new opportunities during periods of change. But decision making can be difficult when you're in the thick of it all. We are experienced wealth managers who do our best work guiding our clients through all stages of life's major transitions. Whether you're newly single, taking in your parents or recovering from loss, our advice can help you move forward with clearer perspective and a customized plan of action.

Taking your business to the next level
You've decided it's time to expand your business. What steps should you take to reach that next level? From financial planning to funding strategies to helping you preserve your personal assets, we have the right information, experience and advice to help you grow your business and your success.

Talking to your family about inheritance
While inheritance planning can be an emotional topic for both parents and children, open, honest discussion among family members makes the process more rewarding for everyone. We can help you have those conversations as you address sensitive issues about your estate, taxes, wealth transfer, trusts and business succession.

These are just some of the priorities we help our clients address. As comprehensive wealth managers, we have the experience and insight to help you address your unique goals and the challenges you face.

Our advice

Customized with your life in mind

At UBS, we tailor our advice to your needs, your objectives, comfort with risk and changing market conditions. In doing so, we leverage the global perspective and intellectual capital of our Wealth Management Research organization—a team whose purpose is to help our clients make better financial decisions.

In today's world, you need to understand how all the pieces of your complex life can affect your pursuit of important financial goals. Whatever your concerns, **Mallah Financial Group** can help you create a comprehensive financial plan designed to help you manage your wealth with your life in mind. It's what we call: Advice. Beyond investing.

"We provide thoughtful advice about the issues you expect to face. And the ones you won't see coming."
– Melissa Dincher

Our relationship

Clients come first in all we do

We receive the greatest satisfaction from helping our clients feel more confident about their future. That's why we're committed to helping you make the best possible choices today and tomorrow. Here's what you can expect from our relationship:

Integrity. Earning your trust is the most important thing we do every day.

Communication. We keep our lines of communication open—providing regular updates, returned calls and timely responses to your questions or any concerns you have.

Clarity. Whether we're discussing risk, performance or an investment strategy, our conversations will always be straightforward so you can clearly understand our approach and reasoning behind our recommendations.

A focus on your best interests. We believe in a clients-first philosophy. All of our advice is based on what we believe to be the best plan of action for you and your goals.

Let's start a conversation today.

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