The Howard Group

Sound guidance in an uncertain world

UBS Financial Services Inc.
13024 Ballantyne
Corporate Place, Suite 650
Charlotte, NC 28277
704-343-4000
855-833-5550 fax
800-438-6503 toll free

advisors.ubs.com/hehowardgroup

Backed by the global resources of UBS

With more than 150 years of wealth management experience at its core, UBS focuses on providing relevant guidance, differentiated global perspectives and diverse strategies and solutions for private, corporate and institutional clients worldwide. Drawing upon an integrated mix of investment banking and asset management businesses, we access the deep resources and wealth management expertise of this firm to deliver the trusted financial advice our clients seek today to confidently move forward.

How do you sell a business that has defined you, transition from a purposeful career into retirement, or provide for loved ones after you're gone? With success comes critical and often challenging conversations that are paramount to sound financial health.

These conversations are often fraught with subjective emotion. That's why it's important to have trusted financial advisors with the knowledge, experience and compassion to help you navigate all aspects of your financial life.

Whether helping our clients understand the fluctuating financial markets, structure a business succession plan, keep up with new tax laws or map a legacy plan for the next generation, The Howard Group provides comprehensive support through objective guidance.

With the backing of the world's largest wealth management firm, UBS, our team can provide you with the vast, global resources necessary to navigate today's ever-changing world.

The Howard Group

Wealth management
Retirement planning solutions
Estate planning solutions
Philanthropic giving
Education planning solutions

Investment management
Global equity strategies
Taxable fixed-income strategies
Custom municipal bonds
Private equity and credit strategies

Liability management
Banking and lending
Private banking solutions

Risk management
Insurance planning solutions
Restricted securities
Hedging strategies
Concentrated positions strategies

Gray Howard
Senior Vice President–
Wealth Management
Senior Portfolio Manager
704-343-4048
gray.howard@ubs.com

Emily Nauss
Registered Client Associate
704-343-4008
emily.nauss@ubs.com

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13024 Ballantyne
Corporate Place, Suite 650
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Hilary Miller
Financial Advisor
704-343-4042
hilary.miller@ubs.com

Rosalyn Burris
Client Service Associate
704-343-4010
rosalyn.burris@ubs.com