



Your life and wealth

ATX Wealth Partners

Private Wealth Management



You have options. Be informed.
Plan early.

Our mission is straightforward: to help provide the advice and knowledge you need to accomplish your goals. It is our job to make sure you are clear about your options and plan early.

To best serve our diverse clients, we have forged close, strategic relationships within UBS—one of largest wealth management firms in the world—and with outside professionals. It is all about you: we are passionate about our clients and the work we do for them.



Personal and professional profile

The people **who matter most** to you

By gaining a deep understanding of your family, friends, colleagues and professional advisors, we can better evaluate your personal and professional challenges and opportunities.





Your goals

What you **want to accomplish** in your life

We listen closely and align our planning strategies with your goals. In that way, we help you pursue the most meaningful outcomes of your wealth.

How do you plan to achieve your life's vision?





Cash flow

Your current and future **sources of income**

In flow. Out flow. We will work with you to make sure what's coming in, what's going out and what you are saving matches your current needs as well as future sources of income from an inheritance, real estate, consulting, pension and Social Security.





Balance sheet

What you **own**, what you **owe**

We help you navigate the intersection of family, business, finance and legacy by building planning strategies that can reflect both sides of your balance sheet.





Investment management

Your **portfolio objectives**

We offer open access to an array of financial solutions both within and outside of UBS. By aligning with your objectives, we focus on asset allocation strategies that allow for sensible growth and help mitigate risk.





Risk management

Identifying and mitigating the **impact of risk**

From life insurance to long-term care to the impact on beneficiaries, we consider your entire wealth picture and everything you care most about.





Wealth transfer and estate planning strategies

Preserving **your life's work**

With our team's extensive planning background—as well as access to UBS's Advanced Planning Group—we bring an experienced perspective to the intersection of wealth management and estate planning strategies.





Philanthropy and charitable intent

The power of wealth and the good it can do

What is the impact you want to have on the world?
We look at what you want to see more of—and less of—
in the world to build an impactful and sustainable strategy.





Business owners and entrepreneurs

The full cycle of **your business needs**

Our expanded resources and professional network can help you understand the value of your business, assess how attractive it will be to a buyer, prepare personalized presale and post-sale plans, and develop succession and exit strategies.





Multigenerational families

A long-term plan

Attuned to protecting the financial independence of your entire family, we can help structure a deliberate and meaningful estate plan focused on your goals, values and the needs of each generation.





Professional athletes

Your sports **career and beyond**

We advise professional athletes and their spouses on their most critical financial decisions. However, beyond finances, we help you plan for life. Our advice is singularly focused on creating a strategy that helps preserve your wealth for you, your family and your future—on and off the field.



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