Posluszny Wealth Management

Contact list

Our team recognizes that things can happen, be it a challenge or an opportunity, and we make it our mission to provide you with exceptional service. Please see below for some common topics and our contact list as a resource to ensure that your questions are addressed in the most efficient manner.

We look forward to serving you.

Topic	Team member
Investment advice	Steve/Doug
Portfolio reviews	Steve/Doug
Financial planning	Doug/Max
Estate planning	Doug
Trust services	Doug
Introductions/referrals	Steve/Doug
Insurance evaluation	Doug/Max
Lending	Doug/Max
Scheduling (meeting and conference calls)	Lisa
Special events (client events, workshops, webinars and market update calls	Lisa/Max
Team website access (*ubs.com/team/poslusznygroup*)	Lisa
Tax information (1099s, cost basis)	Lisa
Estate processing	Lisa
Cash movement (ACH and wire transfers)	Lisa
Account transfer process	Lisa
UBS Online Services access	Lisa
Statements/e-delivery	Lisa
Beneficiary/TOD updates	Lisa
Address Changes	Lisa

Our team	Direct line
Steven S. Posluszny Senior Portfolio Manager	201-441-4961
Douglas P. Posluszny Wealth Advisor	201-441-4955
Lisa Marie Gallagher Client Service Associate	201-587-2034
Maxim O. Shubin, APMA® Wealth Strategy Associate	201-587-2726

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Mack Center IV, Fourth Floor
Paramus, NJ 07652

Posluszny Wealth Management is a boutique multigenerational practice with a team that comprises seasoned veterans of the financial services industry. We work with families, business owners/entrepreneurs and corporate executives, providing them with comprehensive wealth management solutions. We proudly serve many of our earliest relationships and their extended families.

We serve as your concierge by managing your finances, being present at the critical events of your life—such as building a business, starting a family, planning for college and preparing for retirement. We're passionate about providing investor solutions that include financial planning and investment management so that our clients can enjoy comfort and assurance in their ability to accomplish their goals and aspirations.

Our discussions help us gain a deeper knowledge and understanding of your unique situation. This enables us to provide you with advice and guidance to help you create a game plan, review your options and implement your plan, so that you can embrace the future with confidence.

We aim to distinguish ourselves by taking the time to educate our clients throughout the financial planning process and delivering a high level of personal service. We earn your loyalty through hard work, appropriate advice and a dedication to developing long-term relationships.