Architects of a lasting legacy

Montclair Investment Partners

Private Wealth Management

Helping to preserve your wealth and protect your legacy

Over 200 years of combined experience, our team manages wealth for a select group of highly successful individuals, family offices, foundations and endowments throughout the country. We respect your time and priorities and offer you comprehensive, professional capabilities to help simplify your financial life.

Our holistic wealth management approach is based on a clear understanding of your needs. We help provide individualized solutions that are dynamically managed over long periods of time. With our firm’s vast investment and planning tools, we help mitigate risk, seek to optimize returns and offer the potential to minimize taxes and facilitate efficient asset transfers.

Long-term relationships

What matters most to you about impeccable service?

A lifetime of success represents more than your accumulated wealth.

We understand the importance of helping to protect all you've built for your family today and for future generations.

– Our dedicated client service team is always accessible. We are committed to providing our clients with efficient and responsive communication.

– We support clients, their families and their heirs in fulfilling philanthropic, estate planning, insurance and wealth transfer goals.

Holistic wealth management

What do you want to accomplish with your wealth?

We offer guidance that looks beyond your investment portfolio.

We focus on simplifying your complex financial life. This is essential to how we work together. With comprehensive planning, prudent portfolio construction, vigilant due diligence and rebalancing, we help you achieve what matters most.

– We are passionate about the care we take with our clients' wealth. We take advantage of the best opportunities by accessing all resources, including but not limited to, the deep capabilities of UBS.

– We use an extensive network of investment and estate planning, insurance and financial planning specialists across UBS and beyond. This complements and deepens the advice we offer.

– Through our wealth management education efforts, we help prepare future generations for the responsibilities that come with inherited wealth.

Investment advice

What are the best strategies for your specific needs?

Planning and portfolio structuring shape your personal strategy.

Planning is critical to our decision-making process. We recommend solutions that are aligned with the goals established in your financial plan.

– We are committed to identifying the best investment solutions for our clients—whether internal or external to UBS—leveraging the enormous due diligence resources of the firm.

– Each portfolio is tailored to reflect the particular risk, liquidity, tax and style considerations of each client.

– We leverage the global resources of one of the world's leading wealth managers. However, objective and unbiased thinking is fundamental to our practice and the solutions we recommend.

With global resources comes opportunity


Our goal is simple: to uncover the best opportunities the world has to offer. As your Private Wealth Advisors, we summon the institutional capabilities and planning resources of the entire firm to accompany you on every aspect of your life's journey—from professional goals to personal passions.

Customized solutions

As your individual needs evolve, we can draw from a broad range of services over time.

Comprehensive services fully aligned with your goals

- **Financial Goal Analysis**
  A customized assessment of your current and future finances, your goals and the plan to pursue them
- **Investment advisory services**
  Customized advice and objective investment recommendations
- **Investment planning**
  A detailed road map to help meet investment objectives
- **Asset allocation modeling**
  Deep analysis for creating appropriate diversification
- **Estate planning strategies**
  Trust structures, lifetime gifts and insurance planning
- **Philanthropic services**
  Integration of philanthropy into your overall financial plan
- **Tailored financing solutions**
  Credit solutions, including securities backed lending, pre-IPO lending and mortgages as well as customized solutions for private aircraft, art and yachts
- **Income protection strategies**
  Business continuity strategies, annuities, life and disability income insurance
- **Retirement planning**
  Strategies to prepare for the lifestyle you envision

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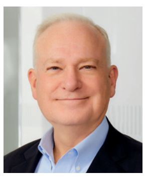

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Asset allocation does not guarantee a profit or protect against a loss in a declining financial market.

The FGA report is based on various assumptions including financial information, personal preferences and other information provided by the client. The report details the assumptions upon which the plan is based. Important: The projections and other information generated by FGA regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results.

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