If you can dream it, you can live it.

The team at The Quantum Group is dedicated to making it possible.

What are the things that matter most to you?

Your answer to that question is the basis for all we do on your behalf, and the ever-present theme behind every conversation.

At the Quantum Group, we understand that as a business owner, your financial journey is intricately tied to the success of your enterprise and the realization of your personal goals.

We partner with clients to connect their financial life with their deepest values and aspirations, delivering peace of mind and the freedom to focus on what matters most.

We specialize in providing comprehensive financial planning and strategic guidance tailored specifically to the needs of business owners like you. Whether you're seeking to optimize your company's value, plan for a successful exit, or align your personal and business financial strategies, we're here to help you achieve your vision for the future by:

- Crafting integrated strategies that align your business goals with your personal values
- Providing expert guidance on value-driven business growth, exit planning and succession
- Leveraging our panel review process to bring customized, tactfully bold recommendations to the planning process while addressing the unique challenges of value-centered entrepreneurship

Partner with us to build a business legacy that reflects your values, secure your financial future and gain the freedom to focus on what matters most to you.

"It's easier to make the right decisions when you're guided by advice you can trust – advice that's focused on what matters most to you."

- The Quantum Group

Service set apart: The Quantum Group

The Quantum Group sets itself apart in several ways. Our family office approach provides a collaborative and high-touch experience delivering team-based yet personalized service to our clients. What does that look like?

Answering questions you didn't know to ask
Years of expertise and walking through stages of life alongside families over decades means we can look at your situation and say "here are some things you might want to think about," with the goal of uncovering strategies, shoring up against vulnerabilities, and providing for future needs for yourself and family members. This is what comprehensive planning means to us.

Project-managing your financial life
Our goal is to free up your time and headspace to focus on what matters most to you. Initially we come up with a blueprint, and we regularly review and check in to ensure the pieces of your plan are attended to. Our clients find this provides enormous peace of mind and leverage of their time. Consider it like having a coach who knows what needs to be done and makes sure you get to the finish line by executing the plan we draft together. We coordinate with and provide referrals to estate planning attorneys, accountants and insurance providers when needed. Our internal client service team is dedicated to making sure every 't' is crossed and 'i' dotted, communicating back to you on what is needed next and when requests have been completed. We strive to provide the just-right level of attentiveness that is rare these days but greatly appreciated by our busy clients.

Uncovering what matters most to
Not everyone immediately sees how having a vision for what they want out of life is inherently tied to financial planning, but most people can acknowledge that feelings, behaviors and values around money are complex and pervasive factors in our lives. Some clients say we are here to talk them out of emotional, knee-jerk decisions, but we see it as a privilege to help clients uncover what really matters most to them, so that their financial resources can be deployed in service of those goals. Answering questions like, "what number do I need to get to before I can retire?" and "should I sell my business or pass it on to my kids?" require more than number-crunching. Our goal is to help you think about the big picture, then build strategies to help you reach your best outcome. It changes the game in freeing you up to live your life and feel confident that you have a financial plan and team in place to support you.

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The Quantum Group Experience

Your journey with the Quantum Group takes place over three distinct phases.

Phase 1: Plan Architecture
We will initially gather financial information, share core planning concepts and ask questions to discover your values and objectives. We focus on six areas that help us to craft a plan that takes into account your current needs and future goals:

- Financial Independence Assessment
- Risk Evaluation
- Balance Sheet Optimization
- Multi-Generational Planning
- Advanced Philanthropic Planning
- Determining What Matters Most

We will review an initial plan draft with you, then a second draft goes through our unique panel review process. During these internal collaborative sessions, each member of our advisory team brings their specialized knowledge and experience to the table, ensuring that every aspect of your financial plan is thoroughly examined and optimized. We will then present the final plan to you and be ready to fine-tune and discuss implementation.

Phase 2: Plan Execution
During this phase, we develop a timeline for implementing each action item in your plan. It is customized based on the planning topics and priorities we've established together, and our team-based model ensures a smooth transition, from transferring in assets to execution of investment strategies.

Phase 3: Plan Maintenance and Review
Ongoing communication is critical to long-term success. We will customize a follow-up schedule to regularly review your plan and upcoming action items with you. Check-in meetings via phone, video conference or in-person visits will be scheduled in advance, with reminders from our team and flexible rescheduling options. Annual reviews ensure we look at all aspects of your plan and strategize any adjustments we want to make.

The Quantum Group Clients

While we do not limit ourselves to particular niches, we do have expertise in working with clients within the following areas:

- **High-net worth individuals and multi-generational families** – Managing wealth spanning many generations requires a careful approach. As your Private Wealth Advisors, we have the experience and strategies to help address these challenges and maximize opportunities.

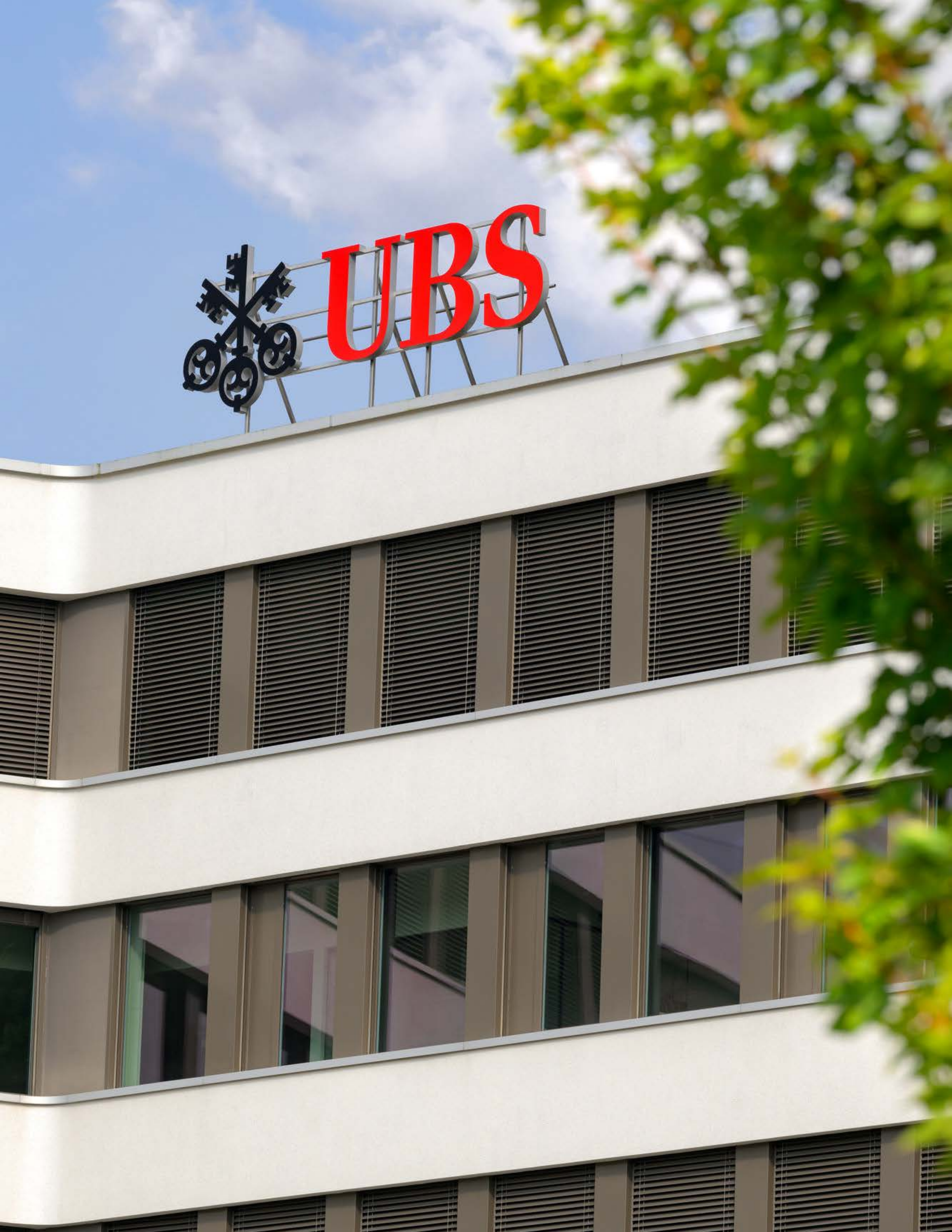
- **Business owners** – At the Quantum Group, we understand that as a business owner, your financial journey is intricately tied to the success of your enterprise and the realization of your personal goals. We specialize in providing comprehensive financial planning and strategic guidance tailored to the needs of business owners like you. Whether you're seeking to optimize your company's value, plan for a successful exit, or align your personal and business financial strategies, we're here to help you achieve your vision for the future.

- **Corporate executives** – Our team brings discipline and strategic planning during your wealth-building years as well as when the time comes to transition out of corporate life.

Nearly 90 percent of our clients have come from existing client referrals, a testament to the strength of our personalized service model.

Connecting you to the deep resources of UBS

By seeing the big picture, we provide access to the global platforms and the financial and intellectual strengths of UBS's experts in Wealth Management, Asset Management and our Private and Investment Banks.


UBS

Meet our team

Gary Barss

Financial Advisor
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Growing a Team Committed to an Exceptional Client Experience

A natural leader and motivator, Gary believes the Quantum Group's high-touch, consultative approach carried out by a group of skilled professionals sets it apart in delivering comprehensive planning and trusted service to clients. Over his 30+ years in the industry, he is grateful for the long-standing relationships and trust built with clients, many of whom are multigenerational families.

A graduate of Pepperdine University, Gary started in the financial services industry in 1992 and joined UBS in 2009. In addition to advising clients, he is also the managing partner for the team and is passionate about developing the highest quality experience for both clients and team members.

Gary and his wife enjoy spending time with family and friends, and especially appreciate the travel traditions they've built over the years. These days they are frequently traveling across the country to visit their two sons in college. Having retired from many years of coaching youth sports, Gary is now focused on staying athletic himself, improving his skills at surfing, water-skiing, golf and swimming. He is proud to participate in Swim Across America each year in support of cancer research.

Stephen Fairfax

Financial Advisor
Private Wealth Advisor
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Orchestrating Solutions for Complex Multigenerational Plans

As a senior planner and founding partner of the Quantum Group, Steve has never met a puzzle he couldn't solve. His passion is in helping multigenerational families with complex estate and tax planning considerations. He spends significant time interfacing with CPAs, estate attorneys and other specialists to ensure seamless end-to-end planning and execution for Quantum Group clients. Steve takes his time to understand a client's goals and aspirations and finds unique solutions to help them meet those goals.

Steve is a graduate of the University of Washington, where he majored in business with a finance concentration. He began his career in the financial services industry in 1987 and has been at UBS since 2009. Steve brings decades of experience not only to his client relationships, but in mentoring Quantum Group advice team members as they develop their skills and expertise, and in leading the team's panel review process.

Steve and his wife, Kristi, love spending time outdoors. If they aren't skiing, golfing or mountain biking, they're probably hiking with their two Portuguese water dogs. And when they're unsuccessful in coaxing their two adult children to visit, they often fill the void by hosting dinner parties for neighbors, or occasionally travelling to favorite spots like Chamonix, France and Tuscany, Italy.

Mickey Portnoy
Financial Advisor
Senior Vice President–
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Wealth Management Expertise for Business and Individual Clients

Mickey's long-standing relationship with clients is a testament to the comprehensive expertise he provides, covering all aspects of wealth and cash management, as well as business, retirement and legacy planning. He is a trusted advisor who has spent his career in the industry, and he enjoys helping clients reach their goals through every life stage.

A graduate of Washington State University, Mickey started his career with EF Hutton in 1987. He has been with UBS since 2010. He is a Chartered Retirement Plans Specialist (CRPS), a credential focused on creating, implementing and maintaining retirement plans for businesses.

Mickey is active in his community serving on several boards. In his free time he enjoys all watersports, including boating, paddleboarding and swimming. When he isn't at home working on projects or gardening, he loves to travel, frequently to Southern California and Hawaii.

Jason Tvedt
Financial Advisor
Vice President–
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Meticulous Planning, Long-standing Client Partnerships

Jason leads the Financial Planning team for the Quantum Group and coordinates overall client service with our Wealth Strategy Associates. A key component in continuing to develop and enhance the level of planning we provide comes from Jason's extensive experience in drafting and designing financial plans.

A graduate of Central Washington University, Jason started in the financial services industry in 2005 and transitioned to UBS with the Quantum Group in 2009. He enjoys the long-standing relationships and careful planning that comes from working with clients through every life stage.

Jason and his wife, Aimee, enjoy family time and keep busy with their three young children. In his free time Jason enjoys working out at the gym and staying active. Jason and Aimee are also active in their community where they are affiliated with the March of Dimes, Wounded Warriors and several missionary and relief organizations.

Robert Chenier, CFP®
Senior Wealth Strategy Associate
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Applying Expertise to Every Financial Plan

With nearly two decades of experience in the financial services industry, Rob is a skilled and trusted advisor to clients. He is passionate about creating personalized financial plans and is constantly learning and applying his knowledge wherever he can to educate clients and help them have long-term success.

Rob began his career at Wells Fargo in 2006 and joined the Quantum Group at UBS in 2016. A University of Washington graduate, Rob is a CERTIFIED FINANCIAL PLANNER™ practitioner, Certified Exit Planning Advisor® and a member of the Financial Planning Association®. He applies his CEPA® credential in working with business owners, helping them consider how their biggest asset (their business) folds into their wealth planning.

When he's not working, Rob loves spending time with his wife and French bulldog. He is a big fan of getting outdoors and stays active with workout groups, running, hiking and weight training. He recently completed his second full marathon and dreams of qualifying for the Boston Marathon one day. Rob also dedicates time and resources to organizations such as Bloodworks Northwest and Asian Counseling and Referral Service.

Emily Grandon, CFP®
Senior Wealth Strategy Associate
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Bringing Peace of Mind with Holistic Planning

As a Senior Wealth Strategy Associate, Emily has seen firsthand how the strength and collaboration of the team brings a unique depth of service to our multigenerational client relationships. She enjoys helping clients craft and carry out plans that give them peace of mind. Her role with the Quantum Group also includes oversight of portfolio strategies preferred by the team; managing platform implementation, due diligence and investment execution.

Emily started in the financial services industry in 2017 and joined the Quantum Group at UBS in 2019. She is a graduate of Eastern Washington University, where she double majored in finance and economics. She is a CERTIFIED FINANCIAL PLANNER™ practitioner, bringing a holistic planning emphasis to her advising role.

Emily and her husband live in the Lake Tapps area with their Siberian husky and two cats. In her free time, she likes to run with her dog, cook, travel and play pickle ball. She volunteers with her local church and Step By Step, an organization helping single moms in crisis secure housing and gainful work.

Quang Bui
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Studied Analysis to Help Clients Reach their Goals

Adept at applying an analytical view to all he does Quang has spent 24 years of his nearly three decades in wealth management serving in leadership roles. As a trusted advisor to his clients, he helps them pursue their financial goals with a careful eye toward the complexities planning can entail. He enjoys the process of helping clients analyze choices and execute a plan that gives them peace of mind.

A graduate of the University of Washington with a degree in mathematics, Quang started at UBS in 2006 after nine years with Morgan Stanley. Now an advisor with the Quantum Group, he brings his management experience and insight to help the team leverage the wealth of resources UBS has to offer and provides guidance in the process of laying out goals and objectives.

Quang and his wife and two daughters love being in the outdoors of the Northwest, particularly out on the lakes and in the mountains either wakeboarding or snowboarding.

Michael Silvernagel
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Trusted Advisor and Partner to Clients

Mike began his career in the financial services industry in 1986 with Shearson Lehman Hutton. He joined UBS in 2007, when it acquired McDonald Investments, where he had been an advisor for 14 years. Mike's more than 30 years in wealth management gives him a broad depth of experience to draw on in his financial planning practice.

With a degree in Business Administration from the University of North Dakota, Mike also holds the elite Wealth Advisor designation at UBS.

Mike and his wife enjoy family time and are proud and doting grandparents.

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Bill Peabody, CFP®
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Janis Shipman
Authorized Officer
Team Administrator
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Customized Planning for Interdependent Goals

Bill started in the financial services industry with EF Hutton in 1985. He joined UBS in 2009, where he developed his practice focused on helping clients understand the interdependent nature of their financial and personal goals.

Bill graduated from the University of Puget Sound, majoring in economics with a minor in philosophy. In 2008 he achieved the designation of CERTIFIED FINANCIAL PLANNER™ professional.

Bill and his wife, Carol, have two children and three grandchildren. He enjoys mountain climbing and has summited Mt. St. Helens and Mt. Rainier. When at sea level, he enjoys golf and competes nationally on the Golf Channel Amateur Tour. He and Carol are members of the Tacoma Country and Golf Club and both enjoy traveling.

Service is in the Details

Working with the Quantum Group for over 20 years, Janis exemplifies the service experience the team strives to bring to clients. Her extensive knowledge of processes and the ease with which she walks clients through the steps of account-opening, cash management, reporting and online services make her an invaluable partner and trusted "go-to" when questions arise. "We have great clients," Janis says, and making their day easier by supporting the operational details of their financial lives is a rewarding part of the job.

Janis began in the financial services industry in 1999 at Smith Barney, and moved with the Quantum Group to UBS in 2009. In her current role as Team Administrator, she provides coordination and oversight of processes for the client service team, in addition to servicing clients. She is also an Authorized Officer, holding Series 7, 63 and 65 securities licenses.

In her free time, Janis is an avid gardener. She and her husband also play pool, competing in regional tournaments, and enjoy spending time with friends and family including their granddaughter.

Kaitlin Melstrand
Client Associate
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A Positive, Team-Player Mindset

Katie came to the Quantum Group as the team was expanding, and quickly showed her strengths as a team player, willing to take on newly defined tasks and pivot when needed as the advisory and service team grew. Her positive, problem-solving mindset is what makes her a trusted support to clients and a valuable asset to the team.

Katie graduated from the University of Wisconsin-Platteville. Her interest in the financial services industry began with an internship at Bronfman Rothschild, and after moving across the country to the Northwest, she joined the Quantum Group at UBS in 2017. In her role as Client Associate, she assists clients with operational and administrative needs.

Katie and her husband, Gunnar, have two young boys and enjoy spending their time with family and their dogs. You will most often find them outdoors, exploring the mountains and adventuring.

Kyra Milstid
Client Relationship Specialist
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Connecting the Dots for Seamless Service

Kyra joined the Quantum Group in 2022 as a Client Relationship Specialist, a role that enabled her to put her extensive background in customer service to work as she got to know clients as the first point of contact for the team and lead scheduler. She is adept at listening to clients' needs and connecting them with the team members and resources that will get answers quickly.

Kyra is now supporting the team as a Client Associate, delving into specific areas requiring added layers of operational support including servicing business accounts and estate processing.

Kyra grew up in Western Washington, and currently lives in Auburn with her husband. They enjoy spending time with friends and family, and love to be outdoors, preferably camping and exploring in their jeep.

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Kelsea Babbitt

Client Associate

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Communication that Exceeds Expectations

Kelsea provides a critical role to the team serving as Client Relationship Specialist. She is the first point of contact receiving calls and handles the majority of scheduling for client meetings with the advising team, as well as heading the client service department. Her goal is to ensure that clients have the best experience possible in their communication with the Quantum Group.

Kelsea brings extensive customer service and office administration experience to her role, having previously worked as an assistant field director for a nonprofit organization and in customer service for the Costco corporation. She started her career at UBS in 2023.

Kelsea enjoys spending time outdoors and can be found on any given weekend hiking in the mountains with her husband and close friends. Here interests also include creative endeavors such as baking, art and playing music.

Evelyn Jones

Authorized Officer

Executive/Team Assistant

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Innovating to Deliver Exceptional Client Experience

With 15 years of executive assistance experience and six years in corporate recruiting, Evelyn knows the importance of forward motion in helping a team reach its goals. She is committed to collaboration and innovation by helping to develop and steer team initiatives that create exceptional client experience. Evelyn is energized by seeing the synergy created when ideas are put into action, and knowing that clients are better served as a result.

Evelyn began her career at UBS in 2013 as Sr. Executive Assistant to the Oregon Complex Director. In 2022 she and her husband took a sabbatical to focus on family. In 2024, she returned to UBS, joining the Quantum Group as an Authorized Officer and Executive/Team Assistant, supporting team leadership and providing client service. She holds the Series 7 and 63 securities licenses and is registered in Washington and Oregon.

Evelyn, her husband and their mini-doodle, Frankie, enjoy traveling and trekking in the great outdoors—hiking, biking and rafting. A self-taught ukulele player, she hosts a Tuesday night uke jam event in her community, and takes time to play and sing for residents at the local senior assisted living center. Evelyn’s hobbies include painting, reading for book club and caring for her large collection of houseplants.

Kristina Scott

Senior Client Service Associate

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A Passion for Helping

With over 20 years of experience in the financial service industry, Kristi has a tremendous base of knowledge in both retail and institutional client service. Her extensive experience paired with a passion for helping others has led her to serve as a Client Service Associate (CSA) coach. Attuned to listening to clients' needs, she is intent on making their experience with the team a positive one, and gets a tremendous amount of satisfaction from assisting others in achieving their financial goals.

Kristi began her career at Morgan Stanley in 2001, where she shared and further developed her skills as both a CSA coach and CSA council member. She joined UBS in 2008 and is now a Senior Client Service Associate.

In her free time, Kristi enjoys cooking, reading, gardening and spending time with friends, family and her chocolate lab Finley.

Start the conversation

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