# Hingham Street Partners

## Team profile

As a team, we leverage our disciplined approach, experience and tenure to help make a real impact on our clients' lives.

We combine personalized wealth management for executives, business owners and families with institutional consulting for corporations, nonprofits and family offices.

With the experience to help manage your complex financial needs and a commitment to engage each generation of your family, we offer thoughtful advice dedicated to pursuing your independence, and building upon your legacy.

"We take the time to listen and gain a deep understanding of you, your family and your business. We work closely with you to develop a plan that connects all aspects of your financial world and delivers the type of service you would expect from a family office."

**– Hingham Street Partners**

## About Hingham Street Partners*

- In excess of $5 billion in assets under management
- 10 master's degrees from institutions including Yale, Boston College, Columbia, Boston University, Bentley and Sacred Heart University
- 6 Senior Portfolio Managers®
- 10 Certified Financial Planner™ professionals
- 2 Chartered Financial Analysts®
- 1 Certified Investment Management Analysts®
- 4 Certified Exit Planning Advisors®
- 3 Chartered Retirement Planning Counselor℠
- 1 Chartered Retirement Plan Specialist®
- 1 Certified Portfolio Manager®
- 1 Financial Paraplanner Qualified Professional®
- 1 Retirement Income Certified Professional®
- 1 Accredited Domestic Partner Advisor
- 1 Certified Divorce Financial Analyst
- Chartered Life Underwriter®
- Chartered Special Needs Consultant®



- *Barron's* Top 250 Private Wealth Team (2022 – 2024). The *Barron's* ratings are awarded annually in April based on information from the prior year Q4.
- *Forbes* Best-In-State Wealth Management Team (2024). The *Forbes* rating is compiled by SHOOK Research and awarded annually in January, based on information from a 12-month period ending March of the prior year.

Eligibility is based on quantitative factors and is not necessarily related to the quality of the investment advice.

## Team planning for your future

Hingham Street Partners has advisors across multiple generations. With continuity plans in place, we are structured differently to provide a generational approach. Although we are a large team, we strive to give a personal and small feel to our clients.

# Corporate profile

## Advice, access and trusted relationships

UBS is a leader in serving high net worth and ultra high net worth individuals and families, business owners and corporate employees

**UBS Financial Advisors:**
- Focus on what's most important to you and your family
- Offer thoughtful advice, backed by the strength of UBS
- Deliver access to our leading global capabilities
- Provide timely investment insights from markets and economies around the world

Together, we can build a financial plan driven solely by your goals and supported by sophisticated tailored solutions.

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## World-class solutions

We harness our global resources to address clients' sophisticated needs

**Planning**
- Education planning
- Estate planning strategies
- Insurance and annuities
- Retirement planning
- Wealth planning

**Investing**
- Alternative investing
- Inclusive investing
- Institutional consulting
- Portfolio management
- Structured solutions
- Sustainable investing

**Giving**
- UBS Philanthropy
- UBS Optimus Foundation is a global network of separately organized and regulated tax-exempt charitable organizations founded and managed by UBS that engage in a broad range of charitable and philanthropic activities around the world.

**Banking**
- Mortgage planning
- Cash management
- Commercial financing
- Savings
- Securities-backed lending
- Credit cards

**Private Wealth Management**
- Advanced tax planning strategies
- Family advisory & philanthropy

**Workplace Wealth Solutions**
- Financial wellness
- Retirement plan services
- Equity plan services

**Hingham Street Partners**
**UBS Financial Services Inc.**

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## Industry recognition

UBS is consistently honored by peers for excellence in serving clients

**PWM/The Banker**
Published by the *Financial Times*

# Best

- Global Private Bank *2023*
- Chief Investment Office in Private Banking *2023*

The PWM/The Banker Global Private Banking Awards are based on information from January to December of the prior year. UBS paid a license fee for use of the rating. The awards apply to UBS Group AG, which is the parent company of UBS Financial Services Inc. and relates to the strength and capability of the global organization. It does not relate to the quality of our investment advice.

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**Euromoney**

# #1

- in Private Banking for High Net Worth clients *2015 – 2022*
- in ESG and Impact Investing *2015 – 2022*
- in Family Office Services *2016 – 2018* *2020 – 2022*

The *Euromoney* Private Banking and Wealth Management Surveys are based on information from Q4 of the prior year. UBS paid a license fee for use of the rating. The awards apply to UBS Group AG, which is the parent company of UBS Financial Services Inc. and relates to the strength and capability of the global organization. It does not relate to the quality of our investment advice.

* As of June 11, 2024.

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Sustainable investing strategies aim to consider and in some instances integrate the analysis of environmental, social and governance (ESG) factors into the investment process and portfolio. Strategies across geographies and styles approach ESG analysis and incorporate the findings in a variety of ways. Incorporating ESG factors or Sustainable Investing considerations may inhibit the portfolio manager's ability to participate in certain investment opportunities that otherwise would be consistent with its investment objective and other principal investment strategies. The returns on a portfolio consisting primarily of ESG or sustainable investments may be lower or higher than a portfolio where such factors are not considered by the portfolio manager. Because sustainability criteria can exclude some investments, investors may not be able to take advantage of the same opportunities or market trends as investors that do not use such criteria. Companies may not necessarily meet high performance standards on all aspects of ESG or sustainable investing issues; there is also no guarantee that any company will meet expectations in connection with corporate responsibility, sustainability, and/or impact performance. Insurance products including annuities are made available by UBS Financial Services Insurance Agency Inc. or other insurance licensed subsidiaries of UBS Financial Services Inc. through third-party unaffiliated insurance companies.

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UBS Bank US—Equal Opportunity Lender. Equal Housing Lender. EQUAL HOUSING LENDER



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