Influential Women of San Francisco

From left to right: Amanda Woo, Nancy Barrettt, Michelle Harvey

As a Managing Director and Financial Advisor with Aquitaine Wealth Management at UBS, Nancy Barrett and her all-female team are seeking to redefine the way people think about wealth management. Together, they're a powerhouse that holds more than 75 years of industry experience, which they're using to change the way their clients experience wealth management.

"We operate with an unwavering adherence to the highest professional and ethical standards," says Nancy. "But we also know how to bring relevant, innovative solutions to our clients' ever evolving needs." Knowing that clients can often feel intimidated and overwhelmed by the financial decisions they face, Nancy and her team lead with a client-first approach that seeks to simplify and educate every step of the way.

"We focus on providing our clients with a boutique firm experience that leverages the capabilities and resources of a leading global wealth manager," says Nancy.

"We use creative and customized investment concepts and wealth management resources, allowing us to manage all our clients' intersecting facets of retirement planning, investment management, trust and estate planning strategies, tax awareness, and cash flow management. We chose this career because we believed there was room for a different approach in the advisory world. Our clients work with all three of us, and we let them know that they can always just pick up the phone, share their concerns, and be led to a decision that takes into consideration their unique needs for their unique situation."

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