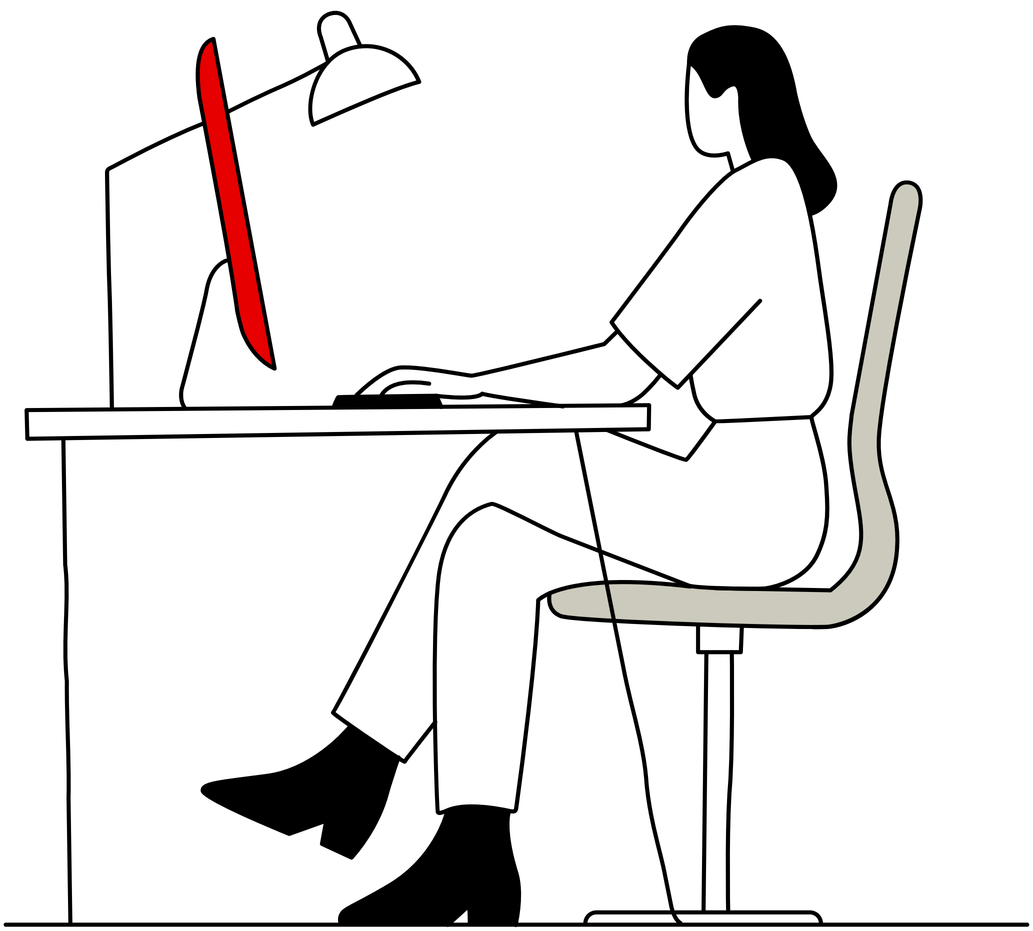
Her Wealth

Katz Wealth Management
UBS Financial Services Inc.
Private Wealth Management



UBS

Women are making extraordinary strides, from the expectations they defy, to the visions they pursue, to the barriers they break. Yet, UBS research shows that significant challenges remain when it comes to women's financial participation. At UBS, we want to be a part of the solution, helping women navigate their financial lives and claim their rightful seat at the money table.

Katz Wealth Management has developed an area within our team that specifically focuses on making our female clients a top priority. Led by Jordan Ricciardi, we work with women one-on-one to ensure they feel educated and confident as they navigate their personal finances. We also host numerous events during the year to create environments for other like-minded women to connect.

With extensive experience in helping women overcome distinct challenges and achieve their most important goals, we offer a wide range of capabilities to support you at every stage of life.

Meet the team

Jason Katz, CIMA®
Private Wealth Advisor
212-713-9201
jason.m.katz@ubs.com

With over 30 years of experience, Jason is a Private Wealth Advisor, Managing Director, Senior Portfolio Manager, and Athletes & Entertainers Consultant. Jason is a frequent guest on CNBC, Fox Business News and Bloomberg TV. He is the founding senior team member of Katz Wealth Management and oversees the team's customized equity and exchange traded fund models for clients. He also has extensive experience in selecting and monitoring top institutional money managers, hedge funds and private equity funds. Lastly, he has been named a *Forbes* Best-In-State Wealth Advisor in New York, 2018 – 2024. The *Forbes* rating is compiled by SHOOK Research and awarded annually in April based on information from a 12-month period ending June of the prior year. Eligibility is based on quantitative factors and is not necessarily related to the quality of the investment advice.

Jordan Ricciardi, CIMA®
Senior Wealth Strategy Associate
201-352-7097
jordan.ricciardi@ubs.com

Jordan oversees Katz Wealth Management's Women's area and focuses on the financial needs of women and next generation clients assisting them with financial planning, investment analysis, and tailoring portfolios to align with their objectives. Jordan also cultivates and hosts client events with top industry thought leaders focused on empowering female investors. She is a Certified Investment Manager Analyst. Outside of the team Jordan is on the communication committee for All Bar None the firm-wide network for women.

Ella Weider, CFP®
Wealth Strategy Associate
ella.weider@ubs.com

Ella provides clients with with comprehensive financial planning, which includes retirement planning, cash flow projections, insurance reviews and asset allocation strategies. She also assists with administrative and operational client service.

Layla Shapiro
Registered Client Associate
layla.shapiro@ubs.com

Layla provides operational support for the team including new client on-boarding, account maintenance and assisting with client requests. Layla is also responsible for the team's client events and social media content.

Grace Wingerter
Senior Registered Client Associate
grace.wingerter@ubs.com

Grace provides ongoing administrative and operational client service such as new client orientation and onboarding, account maintenance and client requests.

Esther Wintner
Wealth Strategy Associate
esther.wintner@ubs.com

Esther plays a crucial role in our team by providing timely market updates and conducting portfolio reviews. In addition to these responsibilities, Esther also offers administrative and operational support.

Kate Sheridan
Executive/Team Assistant
kathryn.sheridan@ubs.com

Kate is responsible for organizing client meetings and events, along with providing clients with account-related services and documents.

We provide periodic monitoring of advisory accounts in accordance with the client's agreements with UBS. Unless separately agreed in writing, UBS does not manage client's brokerage account, and clients make the ultimate decision regarding the purchase or sale of investments.

> Whether building a business, preserving your lifestyle in retirement or planning your legacy, we are a team of dedicated professionals who share your vision, seek to earn your trust and work diligently to help you pursue your goals.

– Jason Maxwell Katz

Why work with us?

We provide boutique advice backed by the full resources of one of the world's largest wealth management firms.

Our skilled team consists of credentialed Financial Advisors focused on delivering the highest caliber of service and advice.

Through our solution set and comprehensive planning process, we can address both the assets and liabilities of your personal balance sheet.

As part of the Private Wealth Management division at UBS located in the New York City office with a presence in South Florida, we have access to the firm's thought leaders and decision-makers.

We can provide the confidence that comes from a team that truly cares about you and each generation of your family.

Our wealth management process

Identify

- We begin with a deep conversation to **identify** your investment goals, planning needs, risk tolerance and more

Plan

- From there, Katz Wealth Management will develop your customized financial **plan**
- The plan is guided by your goals and helps dictate your optimal investment allocation

Agree

- Next, Katz Wealth Management will collaborate to prepare a detailed analysis of your portfolio
- Working with you, we mutually **agree** on the solutions that best help you pursue your goals at every phase of your life

Implement

- Once your plan is in place, we can help you **implement** your investment solutions
- Our team oversees your investment strategies and keeps you apprised of your progress

Review*

- We can **review** upon your request and make any adjustments necessary as your life, financial circumstances and goals change

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Katz Wealth Management
UBS Financial Services Inc.
Private Wealth Management
1285 Avenue of the Americas
15th Floor
New York, NY 10019
212-713-9201
877-295-1142 fax

advisors.ubs.com/katz

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