



The Zeigler Group
UBS Financial Services Inc.

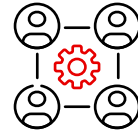
We offer the confidence and clarity you deserve, along with the care and commitment you expect, as we help you and your family navigate a successful financial future.



About Us

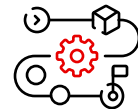
At The Zeigler Group, we focus on providing ultra-focused wealth management strategies tailored to the unique objectives of ultra-high-net-worth families.

With a commitment to tax sensitivity and multigenerational estate planning strategies, we approach every client relationship with a long-term perspective, guided by unwavering moral character and an ambition to exceed expectations.



A Team Approach to Your Family

Our team operates like a family office, delivering a full-service experience while seamlessly collaborating with your existing CPA and attorneys. Through the global reach of UBS, we provide access to resources, backed by our collective expertise and meticulous attention to detail.



A Clear Roadmap

Our discerning clients benefit from a clear roadmap to achieving their objectives, supported by a team that prioritizes knowledge, diligence, execution, and follow-up at every step. Through a detailed financial goals analysis, we strive to align solutions with their short-term needs and long-term aspirations. Beyond managing wealth, we focus on helping our clients design a legacy and leave a lasting impact.

Who We Are

Drawing on the insight of UBS, as well as professional qualifications, you'll receive Advice Beyond Investing. Your goals are our focus and achieving them is a commitment we share.



Perry Zeigler, AWMA™, CFP®,
CIMA®, CPWA®, CPM®
Financial Advisor
Managing Director- Wealth Management
858-947-7033
perry.zeigler@ubs.com



Karen Dhuyvetter,
CPWA®, CFP®, CRPC®
Relationship Manager
858-947-7987
karen.dhuyvetter@ubs.com



Casey Camacho-Jones
Team Administrator
Associate Director
858-551-9479
casey.camacho-jones@ubs.com



Madeleine Jackson
Registered Client Service Associate
858-947-7097
madeleine.jackson@ubs.com



Team Spotlight

Perry has provided customized professional guidance, investment management and financial services to individuals, families, endowments and foundations for over 30 years. Perry's disciplined investment philosophy and custom investment models are grounded in risk management. He serves as Wealth Management Advisor on the team and facilitates economic and market updates.

Perry will be the first to tell you: "Investments are an important part of one's overall financial plan", they are just a part. He believes sound comprehensive financial planning is key to achieving your financial goals. Through bull and bear markets, Perry remains committed to providing consistent and reliable service to our clients.

Perry is a CERTIFIED FINANCIAL PLANNER™ professional and holds the Certified Investment Manager Analyst (CIMA®), Certified Private Wealth Advisor (CPWA®) and Certified Portfolio Manager (CPM®) designations, in addition to the Series 7 & 66 FINRA securities registrations and State of California Insurance license (#0B37538). Perry graduated with a B.S. in Marketing and Logistics from the University of Wisconsin-Madison.

Perry Zeigler, AWMA™, CFP®,
CIMA®, CPWA®, CPM®

Financial Advisor

Managing Director - Wealth Management

858-947-7033

perry.zeigler@ubs.com



Team Spotlight

Passionate about private wealth planning, Karen serves clients with her innate care for their overall well-being. With 20+ years of industry experience, she supports our team in tailoring financial advice for multi-generational families, corporate executives, and entrepreneurs. Areas of expertise include investment advisory, cash flow management and lending, cross border planning, insurance protection, retirement, wealth transfer, and philanthropy. By collaborating with tax advisors and estate planning attorneys, while leveraging the extensive global resources of UBS, Karen shares insights that help transform personal aspirations into reality through thoughtful goal setting and strategy design. Together with her team, her mission is to inspire clients so that they feel empowered to pursue their dreams and life goals.

Karen holds the Certified Private Wealth Advisor® (CPWA®) and Chartered Retirement Planning Counselor® (CRPC®) designations. She is also a CERTIFIED FINANCIAL PLANNER™ professional. Recently, Karen obtained the Global Financial Planning Certificate through the Investments and Wealth Institute (IWI). She also maintains the Series 7 & 66 FINRA Securities registrations and State of California Insurance license (#0D90393). Karen graduated with a Master's Degree in Civil Engineering from Ghent University in Belgium and is multi-lingual (English, Flemish, French and Italian).

Karen Dhuyvetter,
CPWA®, CFP®, CRPC®

Relationship Manager

858-947-7987

karen.dhuyvetter@ubs.com



Casey Camacho-Jones

Team Administrator

Associate Director

858-551-9479

casey.camacho-jones@ubs.com

Team Spotlight

As our Team Administrator, Casey Camacho-Jones leads the daily operations of the team and champions service excellence for clients, overseeing client onboarding, estate processing, lending, account maintenance, and a full range of operational inquiries. With over 13 years of experience in the financial services industry, Casey has held a variety of roles that reflect a deep commitment to client service, operational excellence, and team development. His passion for creating a premium experience for client relationships sets the team apart from all others.

Casey holds Series 7, 9, 10, and 66 licenses, as well as a California insurance license, and earned his B.A. in Communication from San Diego State University.



Madeleine Jackson

Registered Client Service Associate
858-947-7097
madeleine.jackson@ubs.com

Team Spotlight

Madeleine is a Registered Client Service Associate with over nine years of experience in the financial services industry, distinguished by her dedication to exceptional client service and her ability to support complex wealth management relationships. In her role, she oversees a broad range of responsibilities, including client communication, operational execution, financial plan formation, scheduling and review coordination, and digital engagement. Madeleine is deeply committed to delivering a seamless and proactive client experience—anticipating needs, facilitating informed decision-making, and ensuring that every interaction reflects the highest standard of care.

With a strong passion for working with families, Madeleine approaches each relationship with empathy and an unwavering focus on long-term planning. She draws on her knowledge of financial strategies to help clients gain confidence in their goals, working collaboratively with advisors and internal partners to ensure all expectations are consistently exceeded.

Madeleine holds Series 7 and 66 FINRA registrations as well as the State of California Insurance License (#4374962). She is a graduate of the University of San Diego, where she earned a Bachelor of Arts in Communication Studies with an emphasis in Business Administration.

What We Do

Advice Beyond Investments

We deliver comprehensive goal assessment, combining tailored wealth planning, investment, tax and estate planning strategies with the global resources of UBS. Our team of experienced and highly credentialed professionals is dedicated to keeping the focus on you and your unique objectives.

Your Family's Private Wealth Management



Backed by the Global Resources of UBS

160
years experience

50
countries worldwide

\$5.9+
trillion invested assets

Source: UBS, April 2026

Why Us

Comprehensive Wealth Strategies

A family office-style approach helps to address various aspects of your financial life, including investment management, tax and estate planning strategies, and more.

Seamless Collaboration

By working closely with your existing CPA and attorneys, the team provides a unified strategy, helping to eliminate gaps or overlaps in your wealth plan and simplifying your decision-making process.

Full-Service Experience

We provide comprehensive, integrated guidance and oversight through planning and investment management services along with the extensive range of banking services at UBS*. The team also collaborates with professionals across UBS and the broader industry to provide tailored strategies.

Access to Global Resources

Leveraging UBS's expansive network, you gain access to cutting-edge tools, research, and global opportunities tailored to your goals, offering you an edge in comprehensive wealth management.

Collective Experience

A team approach combines diverse specialties and perspectives, ensuring your strategy benefits from comprehensive knowledge and innovative thinking.

Meticulous Attention to Detail

Our approach emphasizes precision, striving to address every aspect of managing and supporting your family's financial goals.

Personalized Focus

Our collaborative approach emphasizes understanding your family's unique needs, values, and goals, resulting in strategies that align with your vision for the future.

Long-Term Continuity

A team approach is designed to support consistent service and strategy, helping to maintain stability for your family over time.

*Banking and lending services are provided by UBS Bank USA, a subsidiary of UBS Group AG. UBS Bank USA, Member FDIC, NMLS no. 947868.

Who We Work With



Corporate
Executives



Entrepreneurs



Families with
Accumulated Wealth

Team Partners



Kevin Dallahan
Senior Wealth Management Banker
UBS Bank USA

Current role and areas of expertise

Kevin Dallahan joined UBS Bank USA in 2016, and he is currently a Senior Wealth Management Banker covering Los Angeles and San Diego, California.

Kevin has an extensive background in relationship banking. He is focused on providing Financial Advisors and their clients a variety of cash management resources along with banking solutions that may complement their overall wealth management objectives.

NMLS # 740172

Senior Wealth Management Bankers are employees of UBS Bank USA. UBS Bank USA is a subsidiary of UBS Group AG. UBS Bank USA, Member FDIC, NMLS No. 947868.



Laura Chooljian
Senior Wealth Strategist
UBS Advanced Planning Group

Current role and areas of expertise

Laura works with UBS ultra-high net worth clients and advisors on issues involving estate and tax planning, business succession, wealth transfer and philanthropic objectives.

The Advanced Planning Group consists of former practicing estate planning and tax attorneys with extensive private practice experience and diverse areas of specialization, including estate planning strategies, income and transfer tax planning, family office structuring, business succession planning, charitable planning, and family governance.

UBS Financial Services Inc., its affiliates and its employees do not provide tax or legal advice. You should consult with your personal tax and/or legal advisors regarding your particular situation.

Team Partners (continued)



Peter Yan

Executive Director, Unified Global Banking
UBS Investment Bank

Current role and areas of expertise

Peter is an investment banker dedicated to UBS Global Wealth Management, helping its clients access the firm's full suite of investment banking services and industry sector capabilities. He joined the firm in 2025 and is based out of Los Angeles.

Prior to UBS, Peter spent over a decade in investment banking at Moelis covering media, tech and consumer in Los Angeles and New York. In that time, Peter has worked closely with many founder-led and family-owned businesses and has completed over \$20bn in transaction volume.



**David B. Harris, CRPS™,
CEPA®**

Senior Vice President – Wealth Management
UBS Senior Retirement Plan Consultant

Current role and areas of expertise

David works with clients to bring clarity and confidence to their financial lives. By understanding what matters most to each client, he delivers customized strategies that support long-term success— from building wealth to transitioning out of a business.

David focuses on helping business owners prepare for and execute the sale of their businesses. He guides clients through the complexities of exit planning while also helping them transition and manage their personal wealth post-sale.

David holds the Series 7, 63, and 66 securities licenses and has earned both the Certified Retirement Plans Specialist (CRPS®) and Certified Exit Planning Advisor (CEPA®) designations.

Our Process

1

Identifying Your Values and Objectives

Our Financial Goals Analysis involves understanding a client's financial situation, goals, personality, values, and interests. We begin by asking five questions to help determine the path forward.

- What do you want to accomplish in your life?
- Who are the people that matter most to you?
- What do you want your legacy to be?
- What are your main concerns?
- How do you plan to achieve your life's vision?

2

Building Your Wealth Plan

Our planning approach is a systematic way of making your goals more tangible and identifies three strategies to incorporate.

- Liquidity
- Longevity
- Legacy

3

Implementation of Wealth Strategies

We focus on translating your strategies into actionable steps.

- Investment Management
- Estate & Legacy Strategies
- Tax Planning Strategies

Investment Philosophy

Our approach leverages an algorithm-based model that has been in practice for more than 25 years, providing a structured framework utilized by ultra-high-net-worth families.



Investment Analysis

We consider a broad range of investment vehicles—including stocks, bonds, mutual funds, private equity, and alternative investments. Guided by a rigorous process of ongoing research, evaluation and opportunity outlook, portfolios are analyzed with careful attention.



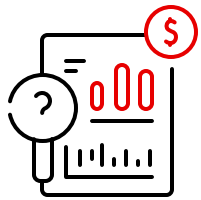
Tailored Portfolio Design

Your portfolio is designed to reflect the unique needs and goals of you or your family, resulting in personalized and carefully managed solutions that balance complexity with precision.

Service Model

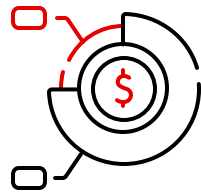
We provide a structured approach to your wealth management through quarterly formal meetings.

These sessions include:



Updates to Financial Planning Analysis

Ensuring your plan reflects current circumstances and priorities.



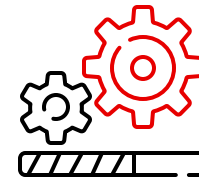
Investment Review

Assessing portfolio performance and alignment with your objectives.*



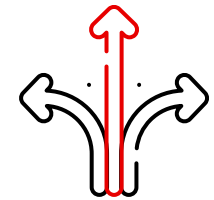
Outcome Tracking

Monitoring progress toward your financial goals.*



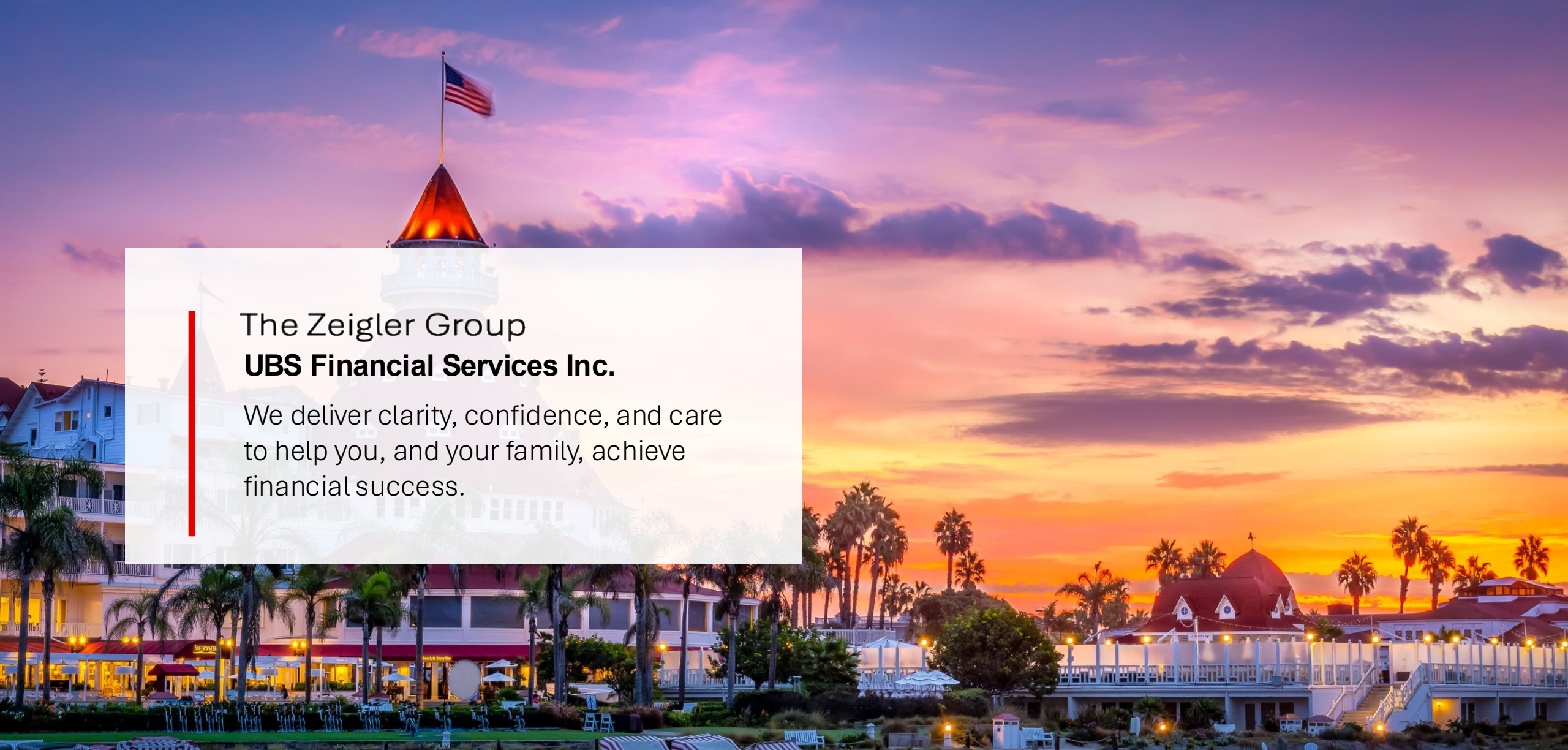
Progress Updates

Keeping you informed of key developments and changes.



Exploration of New Opportunities

Identifying strategies and investments to further enhance your wealth plan.



The Zeigler Group
UBS Financial Services Inc.

We deliver clarity, confidence, and care to help you, and your family, achieve financial success.



Important Information

The Zeigler Group
UBS Financial Services Inc.
12220 El Camino Real, Suite 400
San Diego, CA 92130

advisors.ubs.com/thezeiglergroup

The information contained in this presentation is not a solicitation to purchase or sell investments. Any information presented is general in nature and not intended to provide individually tailored investment advice. The strategies and/or investments referenced may not be suitable for all investors as the appropriateness of a particular investment or strategy will depend on an investor's individual circumstances and objectives. Investing involves risks and there is always the potential of losing money when you invest. The views expressed herein are those of the author and may not necessarily reflect the views of UBS Financial Services Inc.

Neither UBS Financial Services Inc. nor its employees (including its Financial Advisors) provide tax or legal advice. You should consult with your legal counsel and/or your accountant or tax professional regarding the legal or tax implications of a particular suggestion, strategy or investment, including any estate planning strategies, before you invest or implement.

The Financial Goal Analysis (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.

There are two sources of UBS research. One source is written by UBS Wealth Management Research ("WMR"). WMR is part of UBS Global Wealth Management & Business Banking (the UBS business group that includes, among others, UBS Financial Services Inc. and UBS International Inc.), whose primary business focus is individual investors. The second source is written by UBS Investment Research. UBS Investment Research is part of UBS Securities LLC, whose primary business focus is institutional investors. The Individual report style, length and content are designed to be more easily used by individual investors.

Insurance products 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.

The research reports may include estimates and forecasts. A forecast is just one element of an overall report. Differences may sometimes occur between the individual and institutional reports with respect to interest rate or exchange rate forecasts due to differences of opinions. The analysts preparing individual and institutional research use their own methodologies and assumptions to make their own independent forecasts. Neither the institutional forecast nor the individual forecast is necessarily more reliable than the other. The various research content provided does not take into account the unique investment objectives, financial situation or particular needs of any specific individual investor. **If you have any questions, please consult your Financial Advisor.**

As a firm providing wealth management services to clients, UBS Financial Services Inc. offers investment advisory services in its capacity as an SEC-registered investment adviser and brokerage services in its capacity as an SEC-registered broker-dealer. Investment advisory services and brokerage services are separate and distinct, differ in material ways and are governed by different laws and separate arrangements. It is important that you understand the ways in which we conduct business, and that you carefully read the agreements and disclosures that we provide to you about the products or services we offer. For more information, please review client relationship summary provided at [**ubs.com/relationshipsummary**](https://ubs.com/relationshipsummary), or ask your UBS Financial Advisor for a copy.

Institutional investment banking services are provided by UBS Securities LLC, a subsidiary of UBS Group AG. Member FINRA/SIPC.

©UBS 2025. The key symbol and UBS are among the registered and unregistered trademarks of UBS. All rights reserved. UBS Financial Services Inc. is a subsidiary of UBS Group AG. Member FINRA/SIPC.