Dedicated team, dynamic roadmap

Addicus Partners
Private Wealth Management

The numbers

Over $2 **billion**
assets under management

5 **person** seasoned
leadership team

80 **years**
of team experience

Over 160 **years**
of UBS global
wealth management

Experience makes the difference
We formed Addicus Partners to be a source of stability and assurance for our clients. Our collective experience paired with the distinct advantage of UBS's global perspective and resources allows us to provide guidance and service to our clients and professional partners.

In partnering with our clients to pursue their goals, three principles guide us: Always do the right thing; understand each client's unique situation; and remember our clients are the cornerstone of what we do. By taking the time to understand individual circumstances, family dynamic or business structure, we can create a dynamic roadmap that seeks to protect wealth today and for generations to come.

Customized advice and solutions

Building on expertise
Our focus is to help shape the financial futures of our clients. We execute by harnessing the combined experience and skills of each team member and we don't shy away from challenges. Our specialists know what questions to ask and how to apply their knowledge, empowering our clients through steadfast guidance, highly customized plans and unwavering discipline.

Aligning the resources you need
We understand the level of sophistication that successful clients, business owners and highly talented individuals expect from their advisors. Our team-based approach offers integrated wealth management strategies that address your entire financial plan, including:

- Wealth transfer and education for multigenerational families
- Pre- and post-transaction planning for business owners on the sale of their business
- Helping to bring clarity and stability to complex family issues such as divorce, special needs, and intra-family disputes
- Charitable planning and fulfilling philanthropic goals
- Tailored banking and lending solutions offered through UBS Financial Services Inc.
- Alternative investments
- Retirement plan consulting
- Institutional consulting

Our global reach serves your individual needs
Our global reach and drive to solve problems keeps us moving forward. Our timely guidance can help navigate major wealth events in all kinds of market environments while our integrated team serves as your connection to UBS specialists locally and globally.

Addicus Partners

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Meet our team

Significant wealth requires strategies that bring together each facet of your financial life.
As a unified team within Private Wealth Management, we draw on the global resources and capabilities of UBS to be the one resource you will ever need for trusted financial advice.

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Borrowing using securities as collateral involves special risks, is not suitable for everyone and may not be appropriate for client needs. All loans are subject to credit approval, margin requirements, and margin call and other risks; credit lines may be subject to breakage fees. For a full discussion of the risks associated with borrowing using securities as collateral, clients should review the Loan Disclosure Statement included in their application package/account opening package. **UBS Financial Services Inc. (UBS-FS) and its Financial Advisors have a financial incentive to recommend the use of securities backed loans, rather than the sale of securities to meet cash needs because we receive compensation related to the loan as well as the investments used to secure the loan.** We benefit if your client draw down on their loan to meet liquidity needs rather than sell securities or other investments, and have a financial incentive to recommend products or manage an account in order to maximize the amount of the loan. UBS-FS and its Financial Advisors and employees offer banking and lending products to clients through our affiliates and third-party banks in our capacity as a broker-dealer and not as an investment adviser.

UBS Bank USA, UBS-FS, their employees and affiliates do not provide legal or tax advice. Clients should contact their personal tax and/or legal advisors regarding their particular situations, including the legal and tax implications of borrowing using securities as collateral for a loan.

UBS Bank US—Equal Opportunity Lender. Equal Housing Lender.

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.

Important information about brokerage and advisory services.
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