

The Zeigler Group
UBS Financial Services Inc.

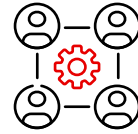
We offer the confidence and clarity you deserve, along with the care and commitment you expect, as we help you and your family navigate a successful financial future.



About Us

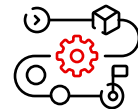
At The Zeigler Group, we focus on providing ultra-focused wealth management strategies tailored to the unique objectives of ultra-high-net-worth families.

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®,
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Karen Dhuyvetter,
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Casey Camacho-Jones
Team Administrator
Associate Director
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Perry Zeigler, AWMA™, CFP®,
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Financial Advisor

Managing Director - Wealth Management

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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.



Karen Dhuyvetter,
CPWA®, CFP®, CRPC®

Relationship Manager

858-947-7987

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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).



Casey Camacho-Jones

Team Administrator

Associate Director

858-551-9479

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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.

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.

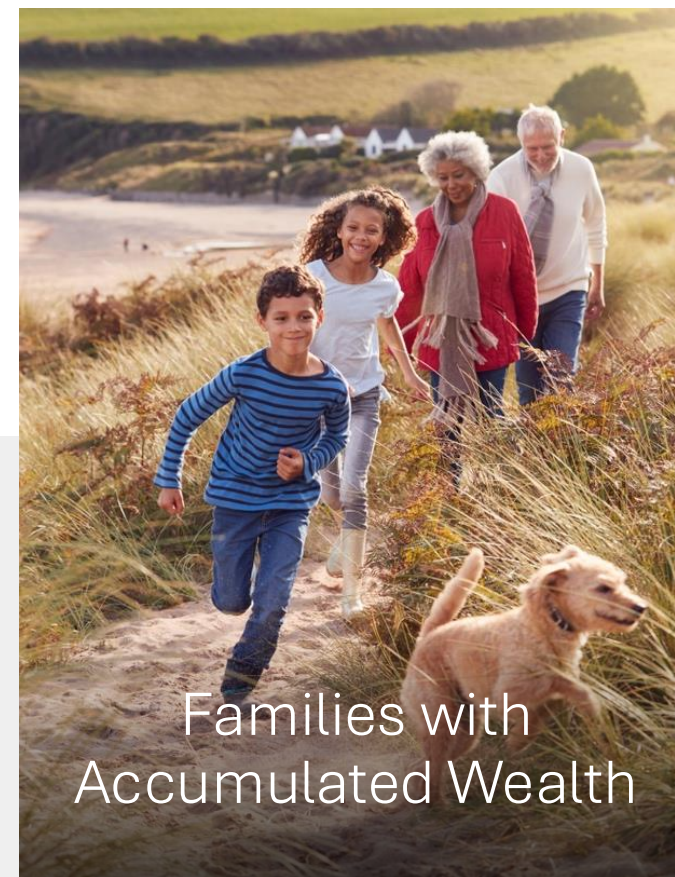
Personalized Focus

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.

Who We Work With



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

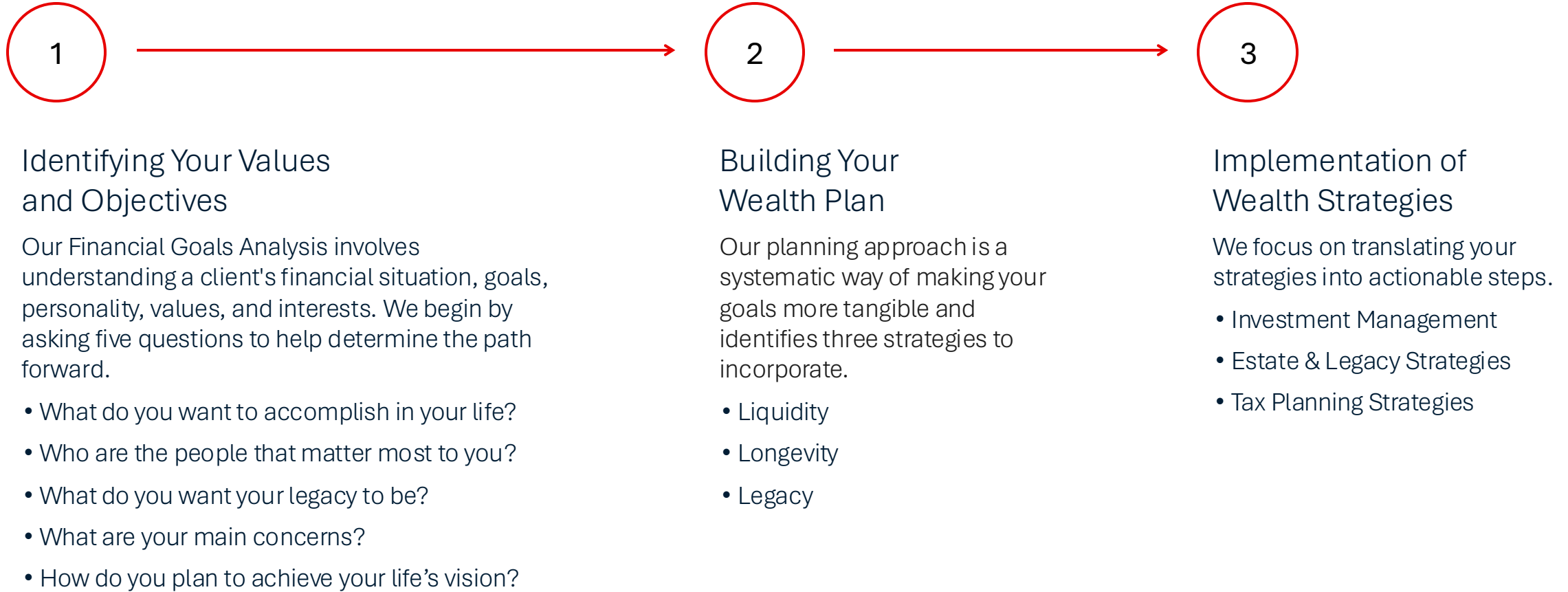
Current role and areas of expertise

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



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.



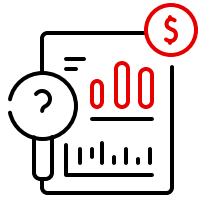
Tailored Portfolio Design

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

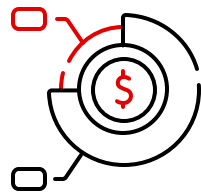
We provide a structured approach to your wealth management through quarterly formal meetings.

These sessions include:



Updates to Financial Planning Analysis

Ensuring your plan reflects current circumstances and priorities.



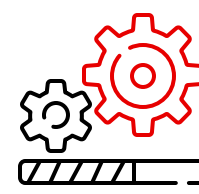
Investment Review

Assessing portfolio performance and alignment with your objectives.*



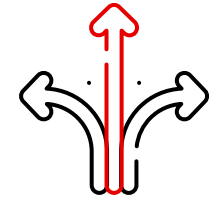
Outcome Tracking

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

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