Flatiron Partners

Your UBS Private Wealth Management Team

Flatiron Partners—Your Advisor Team



Sonia Attkiss
Financial Advisor
Managing Director–
Wealth Management
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Commitment. Engagement. Dedication.

As a UBS Financial Advisor, Sonia is inspired to go above and beyond for clients every day. She joined UBS Private Wealth Management in 2015 after spending 17 years at Credit Suisse.

> "I love what I do. My work, my industry and my clients all contribute to a feeling of exhilaration for a career of service that has promise and momentum."
>
> **– Sonia Attkiss**

While her focus within her practice is customized investment management for entrepreneurs and multigenerational families, Sonia also advises a select group of women about the financial challenges they face. As a passionate supporter of their financial well-being, she aspires to help them view their wealth as opportunity, not just security. It's a busy and demanding career, but she strives to lead by example and demonstrate the values she holds true: commitment, engagement of mind and dedication.

Past Experience

- Managing Director, Private Banking, Credit Suisse
- Aid to a Member of Parliament, Canada
- Architectural Assistant, Private firm in San Francisco, CA
- Assistant, Australia Gallery, art gallery in Soho that sourced Australian artists and Aboriginal art

Education and Designations

- M.B.A., Haas School of Business, University of California, Berkeley
- B.A., Art History, Harvard University

Life and Interests

- Sonia resides in Westport, CT
- Sonia enjoys collecting art, traveling, and working out

Flatiron Partners—Your Advisor Team



Scott Rosenberg
Financial Advisor
Managing Director–
Wealth Management
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Forward thinker driven to help deliver the best for clients

Scott is always looking for new ideas and more innovative strategies to help clients achieve their goals, that can include structured note offerings and hedge fund custodial arrangements, when appropriate. Scott joined UBS in 2015 after spending 17 years at Credit Suisse. He focuses on financial planning, tactical investment management and client portfolio analysis for individuals and family offices.

> "Our team embraces new thinking, creative ideas and innovation. I'm always striving to push through potential obstacles to open doors to solutions that can better serve our clients."
>
> **– Scott Rosenberg**

Although his recommendations often reflect creativity and an "out of the box" point of view, Scott invests for his clients with the same care as he would for his own family—with prudence and a long-term perspective.

Past Experience

- Managing Director, Private Banking, Credit Suisse

Education and Designations

- M.B.A., the Wharton School of the University of Pennsylvania
- J.D., Georgetown University Law Center
- B.A., Economics, University of Michigan–Ann Arbor
- Member of Economics Leadership Council at the University of Michigan

Life and Interests

- Scott resides in Chappaqua, NY, with his wife, Ali, and their four children
- Scott enjoys running, skiing, golfing and playing tennis

Flatiron Partners—Your Advisor Team



Matthew Buchsbaum
Financial Advisor
Managing Director–
Wealth Management
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Hard work, integrity and perseverance

Matthew grew up in a family that was very involved in the financial markets. Matt joined UBS Financial Services Inc., Private Wealth Management Division in 2015 after spending 16 years at Credit Suisse. Matt is a portfolio manager through the UBS Portfolio Management Program.

> "Matt's vision for Flatiron Partners has always been about creating value—having a point of view and the strength of your convictions to stand by your opinion. To him, it's always about hard work, integrity and perseverance, and never about following the crowd."
>
> **– Matthew Buchsbaum**

Matt's vision for Flatiron Partners has always been about creating value—having a point of view and the strength of your convictions to stand by your opinion. To him, it's always about hard work, integrity and perseverance, and never about following the crowd.

Past Experience

- Managing Director, Private Banking, Credit Suisse

Education and Designations

- B.S., Business, Skidmore College

Life and Interests

- Matt resides in Greenwich, CT
- Matt enjoys skiing, golfing, mountain biking, and other outdoor activities

Flatiron Partners—Your Advisor Team



Gerard Costello
Financial Advisor
Managing Director–
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Tireless and tenacious in our approach to advising clients

A UBS Financial Advisor and a key member of Flatiron Partners, Jerry provides families and individuals with sophisticated and intelligent direction to help grow and preserve their wealth and legacy. Within the team, his primary focus is strategic planning, though Jerry's true passion is building relationships with clients, understanding their concerns and guiding them confidently through periods of market uncertainty.

> "The depth of our experience in finance, law and business provides us with a unique perspective to help navigate volatile markets and address the challenges facing our wealthiest and most sophisticated clients."
>
> **– Gerard Costello**

With prior experience as an attorney with an extensive background in securities litigation, Jerry has combined both his legal and wealth management experience to deliver personalized advice that truly helps to address the complex needs of affluent families and individuals.

Past Experience

- Managing Director, Private Banking, Credit Suisse
- Attorney, Securities Litigation, the law firms of Cahill, Gordon, & Reindel and Tenzer Greenblatt

Education and Designations

- M.B.A., Finance, Stern School of Business, New York University
- J.D., Cum Laude, New York Law School
- B.A., European History, Washington & Lee University

Life and Interests

- Jerry resides in Huntington, NY
- Jerry enjoys golf, tennis, live music, and reading
- Jerry is an active member of the Huntington Crescent Club and the Kiawah Island Club

Flatiron Partners—Your Advisor Team



Michael Lorenzo
Financial Advisor
Managing Director–
Wealth Management
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Helping clients grow and preserve their wealth.

Michael brings a diverse background to Flatiron Partners, as he began his financial career in the insurance industry. Over the next 10 years, he evolved his interest in the financial markets to private wealth management. Today, as a Financial Advisor, Michael focuses on investment selection and risk management for clients. He is also a portfolio manager within the UBS Portfolio Management Program.

> "My word and reputation are most important. They are the building blocks of trust, which I believe is the foundation of every long-term client relationship we build with our team."
>
> **– Michael Lorenzo**

Past Experience

- Vice President, Private Banking, Credit Suisse

Education and Designations

- B.A., Sacred Heart University

Life and Interests

- Mike enjoys spending time with his family and meeting new people
- Mike participates in a number of church-sponsored charitable events
- Mike enjoys playing sports and working out

Flatiron Partners—Your Advisor Team



Saman Samii
Financial Advisor
First Vice President–
Wealth Management
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Advising founders and entrepreneurs who are building, scaling, and exiting exceptional companies.

Samii helps clients simplify complexity—organizing, planning, and managing every aspect of their financial lives while positioning them for major liquidity events. Samii is particularly focused on venture-backed and private-equity-backed business owners preparing for a sale, recapitalization, or strategic investment. By leveraging the full global capabilities of UBS—including advanced planning, investment banking, private markets, and a wide network of elite professionals—he ensures clients are equipped with the right strategies at the right time to expand, protect, and ultimately transition their wealth.

> "My job is to simplify the financial lives of a founder—then mobilize the right resources before the market forces the timeline"
>
> **– Saman Samii**

Relationships matter. As a natural connector, Samii leads with access, insight, and execution—quarterbacking resources across UBS and his curated ecosystem so founders can stay focused on running their companies while he helps them design the next chapter.

Past Experience

- Director of Development, ClubCorp
- Entrepreneur and Small Business Owner
- Professional Tennis Coach

Education and Designations

- B.A., Business Administration, Cameron University
- B.A., Communication, Cameron University
- M.S., Kinesiology, University of Central Oklahoma
- Certified Exit Planning Advisor® (CEPA®)

Life and Interests

- World traveler, passionate cook, lifelong athlete
- NCAA All-American Tennis Player 2008 and 2009
- Competed professionally on the International Tennis Federation Pro Circuit representing Sweden

Flatiron Partners—Your Wealth Strategy Team



Connor Gustafson
Wealth Strategy Associate
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Tailored wealth management, grounded in knowledge and experience.

As a Wealth Service Associate, Connor focuses on investment strategy, trading and a number of support services that help "the big things" run smoothly.



Noah Friedman
Senior Wealth Strategy Associate
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Advice tailored to the unique lives and needs of sophisticated clients.

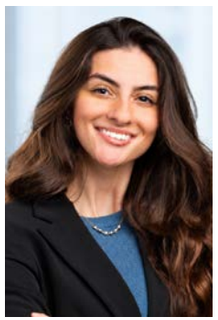
For more than 15 years, Noah has been an invaluable member of Flatiron Partners. Today, he not only oversees day-to-day account administration and communications for the group, but he also builds and deepens relationships with their truly sophisticated and ultra-successful clients.



Whitney Birtwell
Senior Wealth Strategy Associate
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Client-focused wealth management committed to service and solutions.

As a Senior Wealth Strategy Associate, Whitney combines both wealth management insights with high-touch relationship-building. She has worked with Flatiron Partners for more than ten years.



Elisa Mullisi
Wealth Strategy Associate
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Delivering a thoughtful and poised client experience.

Through her commitment to responsiveness, precision, and follow-through, Elisa strives to ensure each client feels genuinely understood, valued, and supported as they navigate their financial journey and evolving priorities.

Flatiron Partners—Your Client Service Team



Emily Ostie
Team Administrator
212-821-7044
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Service and problem-solving create the best client experience.

Within her role as Team Administrator, Emily supports her team in every possible way—from troubleshooting for clients, to account operations to general team initiatives.



Mia Warshaw
Client Associate
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Client Associate specializing in team operations and client service.

Mia joins UBS directly from undergrad where she received a B.S. in Finance from the Robert H. Smith School of Business at the University of Maryland.



Toni Libassi
Senior Wealth Strategy Associate
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Not just getting the job done, but getting it done well.

As a Senior Wealth Strategy Associate, Toni focuses on team operations and client service. Efficient execution of trades and account administration are top priorities for the team's sophisticated clients.



Nick Athanason
Client Associate
212-821-2183
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Client Associate specializing in client reporting, portfolio analysis, and client servicing.

Nick joins UBS directly from undergrad where he received a B.A. in Economics from the College of Liberal Arts at the University of Texas at Austin.

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