

Whom to contact

Service	Contact
Administrative	
Account opening	Adam Doubet and Carly DeLiberty
Wire and fund transfers	Adam Doubet and Carly DeLiberty
Client scheduling, meetings and calls	Peyton Dripps
Online Services (OLS) access	888-279-3343
Address, phone number and e-mail updates	Adam Doubet and Carly DeLiberty
Overall questions	Laura Ann Diamond
Guidance and research	
Market updates, portfolio strategies and investment reviews	Jason Lowy, Nicholas Barbieri, Brian Doak, Michele Lippincott, Palmer Murray, Jason Connor, Matthew Conant and Ben Kellar
Insurance and annuity reviews	Nicholas Barbieri and Matthew Conant
Securities analyses	Ben Kellar and Matthew Conant
Planning and investments	
Financial planning	Jason Lowy, Nicholas Barbieri, Brian Doak, Michele Lippincott, Palmer Murray, Jason Connor and Matthew Conant
Business owner exit planning, endowment and foundation consulting	Jason Lowy
Banking capabilities	Laura Ann Diamond
Equity and alternative investment solutions	Ben Kellar
Trade requests	Ben Kellar
Corporate retirement solutions, deferred compensation and cash balance plans	Jason Lowy and Matthew Conant
Next-generation clients	Palmer Murray, Matthew Conant, Adam Doubet and Carly DeLiberty



Jonathan Murray
 Financial Advisor
 Managing Director–
 Wealth Management
 410-771-3270
jonathan.murray@ubs.com



Brian Doak
 Financial Advisor
 Senior Vice President–
 Wealth Management
 410-771-3268
brian.doak@ubs.com



Jason Lowy
 Financial Advisor
 Managing Director–
 Wealth Management
 410-771-3272
jason.lowy@ubs.com



Nicholas J. Barbieri
 Financial Advisor
 Managing Director–
 Wealth Management
 410-771-3112
nicholas.barbieri@ubs.com



Michele Burch-Lippincott
 Financial Advisor
 Senior Vice President–
 Wealth Management
 410-771-3130
michele.lippincott@ubs.com



Palmer Murray
 Financial Advisor
 Senior Vice President–
 Wealth Management
 410-771-3256
palmer.murray@ubs.com



Jason Connor
 Financial Advisor
 Senior Vice President–
 Wealth Management
 410-790-4473
jason.connor@ubs.com



Laura Ann Diamond
 Team Administrator
 410-771-3269
lauraann.diamond@ubs.com



Matthew Conant
 Senior Wealth Strategy Associate
 410-771-3112
matthew.conant@ubs.com



Ben Kellar
 Senior Wealth Strategy Associate
 410-771-3113
ben.kellar@ubs.com



Adam Doubet
 Client Associate
 410-771-3110
adam.r.doubet@ubs.com



Carly DeLiberty
 Client Associate
 410-771-3111
carly.deliberty@ubs.com

The Murray Group
UBS Financial Services Inc.
 307 International Circle, Suite 440
 Hunt Valley, MD 21030

advisors.ubs.com/murraygroup



Peyton Dripps
 Client Associate
 410-771-3118
peyton.dripps@ubs.com

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