ViewPoint Partners

Private Wealth Management

Team snapshot

$4.4 billion
Assets under management (as of June 2019)

Financial Advisors

- Andrew Perry
- Todd Perry
- Sharon Sager, CIMA®, Institutional Consultant
- Heather Molin
- Hillary Cullen, CFP®
- Loring Swasey, CIMA®
- Matthew Giugliano, CFA
- Aileen Schruth, CFP®, CDFA®, CRPC®

15 team members

ViewPoint Partners is a team of experienced Financial Advisors and Private Wealth Advisors. We have the training and global knowledge that we believe sophisticated investors–successful families, individuals, family offices, and institutions—need today to navigate complex wealth and challenging markets.

Our team has the diverse perspective and insight to create bespoke solutions for the sophisticated needs of our clients. Together with our full-service staff, we work seamlessly to understand our clients' goals, helping to ensure their financial well-being and preserve their legacy for years to come.

Strengths

- Multigenerational team spanning four generations. Having managed assets through seven bear markets and six recessions, the senior members bring wisdom and experience, while the younger members bring continuity and revelance to the younger generations.
- Our long-standing tenure and deep connections within UBS enables us to deliver all the firm has to offer to our clients.
- Four of our nine advisors are women. 95% of women will be their family's primary financial decision maker at some point in their life.[1]
- Servicing legacy institutional relationships informs our perspective. Our Private Wealth Management clients receive the insights and the high-touch service our institutions require.

Industry/sector focus

- Ultra high net worth clients
  - Intergenerational wealth
  - Forbes 400 families
  - Wealth creators/ entrepreneurs
- Women in transition
- Family offices
- Institutional clients
  - Hedge funds
  - Global Family Office

The value of a Family Office Consultant.
Family Office Consultant (FOC) is a UBS business designation reserved for Financial Advisors with a track record of understanding the investment, business, passion and legacy needs of sophisticated, exceptional clients and aligning them to the full suite of UBS capabilities. FOCs undergo rigorous training to strengthen their industry knowledge, and will be available for strategic partnering with other Financial Advisors and Private Wealth Advisors at UBS to cultivate relationships with Ultra High Net Worth clients. Understanding the complexities of intergenerational wealth and the challenges faced by UHNW clients, financial advisors Andrew Perry, Sharon Sager, Heather Molin and Matthew Giugliano hold the Private Wealth Advisor and FOC designation, align specific needs to the full suite of UBS capabilities. Working together, they strive to help these clients address critical concerns to pursue their most important goals.

ubs.com/team/viewpointpartners

[1] Source: Women's Tremendous Economic Power. Infographic. Wealthrive. 2013. http://wealthrive.com/our-story/infographic/

Our team

ViewPoint Partners

UBS Financial Services Inc.
Private Wealth Management
1285 Ave of the Americas
38th Floor
New York, NY 10019
212 821 7032

ubs.com/team/viewpointpartners

Andrew F. Perry
Managing Director
Private Wealth Advisor
Family Office Consultant

Heather Molin
Senior Vice President–
Wealth Management
Family Office Consultant

Matthew Giugliano, CFA
Senior Vice President–
Wealth Management
Private Wealth Advisor
Family Office Consultant

Todd M. Perry
Managing Director
Private Wealth Advisor

J. Loring Swasey Jr., CIMA®
Senior Vice President–
Wealth Management
Private Wealth Advisor

Aileen Schruth, CFP®, CDFA, CRPC®
Associate Director
Financial Advisor Associate

Sharon Sager, CIMA®
Managing Director
Institutional Consultant
Private Wealth Advisor
Family Office Consultant

Hillary Cullen, CFP®
Vice President–
Wealth Management
Private Wealth Advisor

As a firm providing wealth management services to clients, UBS Financial Services Inc. offers both investment advisory services and brokerage services. 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 clients understand the ways in which we conduct business and that they carefully read the agreements and disclosures that we provide to them about the products or services we offer. For more information, visit our website at **ubs.com/workingwithus.**

CFA® and Chartered Financial Analyst® are trademarks owned by the CFA Institute. CIMA® is a registered certification mark of the Investments and Wealth Institute, formerly IMCA, in the United States of America and worldwide. Certified Financial Planner Board of Standards Inc. owns the certification marks CFP® and Certified Financial Planner™ in the US. Chartered Retirement Planning Counselor℠ and CRPC® are registered service marks of the College for Financial Planning®. For designation disclosures, visit **ubs.com/us/en/designation-disclosures.**