

NEBRASKA/SOUTHWEST
IOWA FINANCIAL

Personalized portfolios. Meaningful relationships. Exceptional experiences.

CHRISTOPHER TOTH, CFP®, SENIOR VICE PRESIDENT - WEALTH MANAGEMENT, SENIOR PORTFOLIO MANAGER, AND STEPHANIE HOLMGREN, SENIOR WEALTH STRATEGY ASSOCIATE, OF TOTH WEALTH MANAGEMENT GROUP OF UBS DESCRIBE WHAT THEY BELIEVE SETS THEIR TEAM APART FROM THE COMPETITION.



(l to r) Nancy Mae Domenge, Senior Client Service Associate; Christopher L. Toth, CFP®, Senior Vice President - Wealth Management; Stephanie C. Holmgren, Senior Wealth Strategy Associate

■ WHAT ARE THE BENEFITS OF CHOOSING UBS?

Building on its history of over 150 years, UBS is committed to bringing its global resources to bear on the portfolios of high net worth individuals to help them pursue their wealth management goals. As one of the world's largest wealth managers, we are strongly positioned to help our clients address the realities of the global economy and their sophisticated needs.

■ WHAT DIFFERENTIATES YOUR TEAM FROM OTHER ADVISORS?

We make wealth management simple, personal, and enjoyable. We are compassionate relationship

builders. Our whole team is involved in advising clients and each team member takes ownership of their designated piece of the process. The three of us have a very close relationship, almost like family. Our clients feel this and have comfort knowing we work well together and all care about their financial success.

■ WHAT TYPE OF CLIENTS DO YOU SERVE?

We serve high net worth families planning for financial transition. Oftentimes, this is retirement, divorce, death of a loved one, or family inheritance. Many of our clients are the "millionaire next door" with conservative Midwest values.

■ WHAT CAN CLIENTS EXPECT IN WORKING WITH YOUR TEAM?

They can expect to work with people who care about them. They can expect that every advisor is equally important in our practice—that we each have certain roles and responsibilities and that clients will know what they are. Clients will gain the confidence to pursue their financial goals. We believe that introductions to our clients' friends and family validate that our clients are having positive experiences working with us.

■ HOW WOULD YOU DESCRIBE YOUR INVESTMENT PROCESS?

Our process revolves around our clients' personal financial goals and taking as little risk as possible to attain those goals. We believe we differentiate ourselves by helping clients with personalized portfolios focused on risk budgeting, cost efficiency, and volatility control.

■ WHAT IS THE SIZE OF YOUR PRACTICE, AND ARE YOU ACCEPTING NEW CLIENTS?

We have an intentionally small practice, serving approximately 125 households*. We limit the number of new clients each year to ensure exceptional service is delivered.

For those who would like to learn more about our services, we offer a complimentary consultation with our entire team to see if there is a mutual interest in working together.



Toth Wealth Management Group is located at One Valmont Plaza, Suite 300, in Omaha, NE. For more information, call **402-963-2990** or visit financialservicesinc.ubs.com/team/toth.

*As of 8/22/2016

Christopher Toth is a Financial Advisor with UBS Financial Services Inc., a subsidiary of UBS AG. Member FINRA/SIPC. The information contained in this article is not a solicitation to purchase or sell investments. Any information presented is general in nature and not intended to provide individually tailored investment advice. 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. The views expressed herein are those of the author and may not necessarily reflect the views of UBS Financial Services Inc. In providing wealth management services to clients, we offer both investment advisory and brokerage services which are separate and distinct and differ in material ways. For information, including the different laws and contracts that govern, visit ubs.com/workingwithus. Certified Financial Planner Board of Standards Inc. owns the certification marks CFP® and CERTIFIED FINANCIAL PLANNER™ in the U.S.