As Seen In

Fortune, Bloomberg Businessweek, Entrepreneur & Money

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.

UBS

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