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Axelowitz Kauffmann Group at UBS Private Wealth Management

Mark Axelowitz, CIMA®, Managing Director
Todd Kauffmann, Senior Vice President

“Planning for today and tomorrow: How can an estate plan help you ensure your family’s future?”

By Mark Axelowitz and Todd Kauffmann

You have worked to establish a career and a home, to send your children to school and to plan for retirement. Having done all this to provide for your own and your family’s well-being, you may, like many people, stop short of another important step: creating an estate plan.

An estate plan can help you enjoy the benefits of your success today while providing for others in the future. Putting that plan in place, however, can be a challenge—one that involves many questions, such as:

01 Do you want your children to inherit your entire estate?

02 Do you have a passion for the arts or community service you’d like to express by supporting a charity or foundation?

03 Do you want to encourage your children to achieve certain goals before they receive an inheritance?

04 How do you want to be remembered?

These questions may be difficult and emotional to ask.

At UBS Private Wealth Management, the Axelowitz Kauffmann Group understands that creating an estate plan involves difficult questions. Working to resolve these questions can bring you the comfort that comes from knowing the people you care about most will be provided for and that your estate will be managed according to your wishes. Creating an estate plan can also bring the satisfaction of being able to express your

values through charitable giving in ways that are aligned with your overall financial life.

Mark Axelowitz and Todd Kauffmann can help you assemble a team of wealth management professionals to work with you and your trusted advisors, whether you already have an estate plan in place or need help creating one. Working with professionals in trusts, insurance and financial planning, Mark and Todd can assist you in coordinating the estate-planning process with your accountant and attorney; identifying strategies for goals, such as efficiently managing estate taxes; planning for the succession of a business; maximizing gifts to charities and loved ones; and identifying sources of liquidity to help pay estate taxes. ^W

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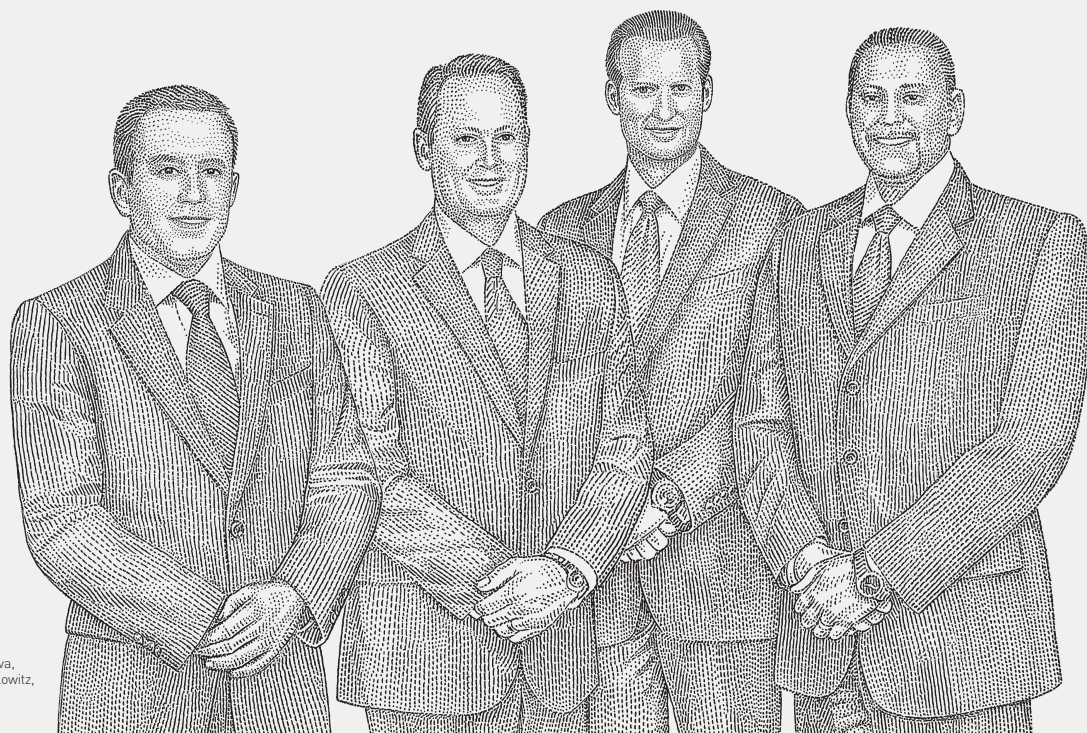
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How to reach **Mark Axelowitz and Todd Kauffmann**

With deep insight and a commitment to your wealth preservation needs first and foremost, we nurture successful, trusted relationships you can count on today and well into the future. Please contact us today at 212.821.7260 to learn more.



Left to right: Michael DaSilva, Todd Kauffmann, Mark Axelowitz, Joy Christian

About Mark Axelowitz and Todd Kauffmann

Mark Axelowitz has provided investment advice to ultra high net worth individuals, family offices and foundations since 1987. He is a certified investment management analyst (CIMA®), a designation he earned through the Wharton School of Business, and he has completed advanced programs in wealth management through the NYU Stern School of Business and the Wharton School's Critical Elements of Consulting. He was selected as one of the Top Ten Outstanding Brokers of the Year by *Registered Rep* magazine and was one of *Barron's* Top Advisors of America. Mr. Axelowitz is an officer on the board of The Boys & Girls Harbor, has co-chaired the Harbor Investment Conference since 2006 and is a member of the Robin Hood Foundation. He has a BA from Hofstra University. Todd Kauffmann has advised clients since 1989 and has been in partnership with Mr. Axelowitz since 1994. He focuses on asset allocation techniques when constructing portfolios specifically tailored to each client. He also advises on lending solutions, fixed income and foreign currency transactions. He completed the Investment Consultant Program at the Wharton Business School and is working toward his CIMA® certification.

Minimum Fee for Initial Meeting
None required

Minimum Net Worth Requirement
\$10 million

Financial Services Experience
**Axelowitz, 26 years
Kauffmann, 25 years**

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