

## Private Wealth Management

# Mauricio J. Alvarez, CPWA®

**UBS Financial Services Inc.**

Private Wealth Management  
816 Highway A1A North  
Suite 300  
Ponte Vedra, FL 32082  
904-280-6035 888-455-8663

[ubs.com/team/dunne-alvarez](https://ubs.com/team/dunne-alvarez)

*By exploring every avenue to uncover and solve problems, asking the critical questions and identifying goals, our team delivers true wealth management to our clients.*

**Mauricio J. Alvarez, CPWA®**

Sr Vice President--Wealth Mgmt  
Private Wealth Advisor  
[mauricio.alvarez@ubs.com](mailto:mauricio.alvarez@ubs.com)

Mauricio is a Private Wealth Advisor within the UBS Private Wealth Management division, located in Ponte Vedra Beach, Florida.

B.S. - Marketing, Florida State University

M.B.A. - Kenan-Flagler Business School, The University of North Carolina at Chapel Hill

CPWA® delivered by Investment Management Consultants Association® (IMCA®) and the University of Chicago, Booth School of Business

### Languages

English and Spanish

### Client Focus

Dedicated to serving an exclusive community of multi-generational families, entrepreneurs and corporate executives .

### Experience

With over 16 years of providing advice, expertise and education to the affluent, Mauricio leverages his experience and education in guiding corporate executives, entrepreneurs and multi-generational families through the lifecycle of wealth.

### Global Perspective

To fully understand our global economy and our global firm, Mauricio has spent time visiting companies across Asia, Europe, Latin America, and the United States. Over these visits, Mauricio has been able to meet corporate, political, and academic leaders from four continents both in developed and emerging markets. By combining, know-how, academia, and interactions with global corporate leaders, our Private Wealth team brings a unique perspective of not only our global financial services firm but first hand cultural experiences.

**Important information about Advisory & Brokerage Services** It is important that you understand the ways in which UBS Financial Services Inc. (UBS) conducts business and the applicable laws and regulations that govern the firm. As a firm providing wealth management services to clients, UBS is registered with the U.S. Securities and Exchange Commission (SEC) as an investment adviser and a broker-dealer, offering both investment advisory and brokerage services. Though there are similarities among these services, the investment advisory programs and brokerage accounts UBS offers are separate and distinct, differ in material ways and are governed by different laws and separate contracts. It is important that you carefully read the agreements and disclosures UBS provides to you about the products or services offered. While UBS strives to ensure that these materials clearly describe the nature of the services provided, please do not hesitate to contact your Private Wealth Advisor if you would like clarification on the nature of your accounts or services you receive from us. For more information, please visit our website at [ubs.com/workingwithus](https://ubs.com/workingwithus). Neither UBS Financial Services Inc. nor any of its employees provides legal or tax advice. You should consult with your personal legal or tax advisor regarding your personal circumstances. Private Wealth Management is a division within UBS Financial Services Inc.

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