Private Wealth Management

Mauricio J. Alvarez, CPWA®

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Private Wealth Management
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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
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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.