MISSION, VISION, & VALUES

ullmann
wealth partners

We are an independent investment advisory and comprehensive wealth management firm headquartered on Florida's First Coast, serving individuals and families across the country.

Our Mission

To be the trusted first point of contact for any financial issue—reducing anxiety and empowering clients to live confidently, knowing their financial goals and objectives are secure.

Our Vision

We are fiercely committed to being a preeminent, multi-generational wealth management firm offering independent, unbiased, and objective financial advice to the individuals and families who have placed their trust in us. As an employer, we are committed to fostering a team of empathetic professionals dedicated to continuous learning and exceptional client service.

Protect the Things We Value

P – Precise Execution

R – Respect, Dedication, and Generosity

O – Outstanding and Elevated Service

T – Trusted Accountability Partnerships

E – Empathy

C – Customized Solutions

T – Teamwork and Collaboration

$1.1 BILLION
Assets Under Management as of 12/31/2024

2
Advisory Professionals for Every Client Relationship

14
Team Members, including: 3 CFP®s, 2 CFAs, 1 CPWA®, 1 JD, 1 CAP®, 1 CDFA®

18 YEARS
Average Advisor Experience

2
Published Books by UWP Team Members

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OUR VALUE PROPOSITION

Our Discipline. Your Freedom.™

We simplify complexity.

We design and implement your wealth management plan to:

- Grow your financial assets over time.
- Protect your wealth and estate for future generations.
- Guide your philanthropic endeavors with strategic insights.
- Provide solutions for intricate financial and tax issues.

By reducing the anxiety of managing financial complexities, we give you the freedom to focus on what matters most in your life.

TARGET CLIENTS

Business Founders

- Facing significant liquidity events.
- Transitioning from business operations to managing investments.
- Seeking expert guidance or family wealth planning.

Wealthy Women in Transition

- Divorcing and newly widowed.
- Experiencing sudden life changes that require a trusted financial team.
- Seeking personalized and attentive service.

High Income, Young Professionals

- Accumulating wealth through high earnings.
- Minimizing taxes on RSU, PSU, or NQSO holdings.
- Seeking sophisticated strategies for asset growth.

Venture Capital & Private Equity Professionals

- Managing complex income streams and requiring tax planning.
- Shifting focus toward multi-generational wealth strategies.
- Appreciating high-level financial advisory expertise.

VISIT OUR WEBSITE

OUR DISCIPLINE. YOUR FREEDOM.™

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