ullmann wealth partners

A PLAN FOR LIFE.
A TEAM TO GUIDE YOU.

You've worked hard. The sacrifices were considerable. The rewards well earned. Now, there is finally time to consider how your wealth can serve your larger life goals. But considering and achieving are two different things. The most valuable tool for you going forward will be to follow a customized life wealth plan. Our role is to be your trusted advisor and family CFO, uniquely combining skills in investment management, advanced planning, and relationship management. Our simple mission is to help you live comfortably and meaningfully.

A WIDER VIEW. A SYSTEMATIC PROCESS.

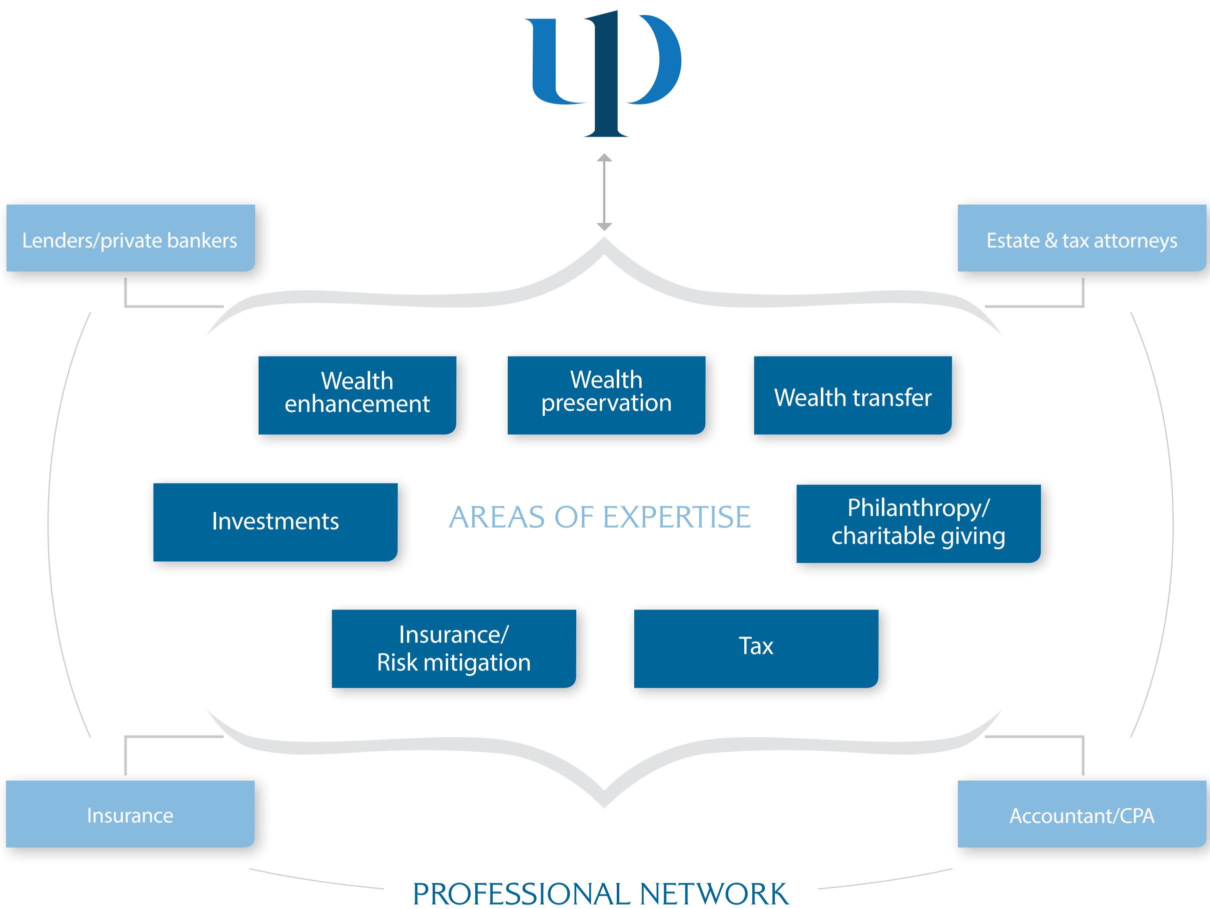
In pursuit of goals we define together, the Ullmann Wealth Partners approach to wealth management combines best practices in investment management, advanced planning, and coordination with your other expert professional advisors. It's a wider perspective that's bigger than financial products and market returns. It is a process, carefully mapped, monitored, and refined. Our client relationships are a true collaboration built on leadership, openness, care, and proactivity.

THE 360° FINANCIAL DISCIPLINE PROCESS

A customized, systematic process to help in achieving overall financial health.

BEYOND INVESTMENT MANAGEMENT

Comprehensive Expertise In Coordination With Your Professional Advisor Network



Our comprehensive knowledge and professional network allow us to expertly access and apply our extensive resources and most relevant wealth management solutions to meet your goals and

challenges. To ensure consistent, thorough attention to your needs, we also work closely with your private banker, insurance advisors, tax advisors, and legal advisors.

BEHOLDEN TO NO ONE – EXCEPT YOU.

We help you achieve and maintain financial independence and confidence with an investment philosophy that is built on proven principles. Recommendations are built on rational analysis, not the emotion or groupthink often sparked by trends, booms, and rushes. And our open-architecture platform means we are independent thinkers, never influenced by the product preferences of a single investment firm.

Instead, we can draw upon vast, unbiased resources to build a diverse portfolio and asset mix that is just right for you—one that will be rebalanced on a systematic schedule to meet the changes and challenges that may come down the road.

INDEPENDENT WITH THE OPEN ARCHITECTURE ACCESS OF A NATIONAL POWERHOUSE

FIDELITY CLEARING & CUSTODY SOLUTIONS®

We are independent planners and wealth advisors with an open architecture platform and resources to build the best plan in support of your goals.

Fidelity Investments® is one of the world's largest providers of financial services that provides custodial and clearing services to Ullmann Wealth Partners' clients.

> "I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel."
>
> —Glenn Ullmann's favorite quote, by Maya Angelou

A RECORD OF ACHIEVING GOALS.

2019
Rebranded to Ullmann Wealth Partners

2018
Brian James, Director of Investments, earns the CPWA® certification

2016
Firm moved into its own stand-alone building

2015
Glenn Ullmann recognized by the *Jacksonville Business Journal* as a Veteran of Influence

2015
Launched the Divorce Advisory Group with the addition of Pat Kilbane

2014
Surpassed $300 million in assets under management

2012
Firm recognized as a NABCAP "Premier Advisor" for proprietary Client Education and Customer Service Model

2004
Glenn published *Landing a Smooth Retirement-The Only Financial Planning Book You'll Ever Need*

2002
Formation of Ullmann Financial

Third-party rankings and recognitions are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any one client's evaluation. The Premier Advisor award by Jacksonville Magazine/904 is based on criteria used by the NABCAP, which evaluates candidates on 20 categories of practice management. Characteristics of an advisory practice evaluated include but are not limited to: Years of experience, Credentials/Designations, Average AUM per client, Investment philosophy, Risk philosophy, U4/ADV status, and Customer service. Advisors are invited to participate by submitting an online questionnaire. No fee is paid to participate. Certified Private Wealth Advisor® (CPWA®) certification is an advanced professional certification for advisors who provide the breadth of specialized skills required to meet the needs of high-net worth clients.

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OUR DISCIPLINE. YOUR FREEDOM.™

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