Protecting Client Lifestyles With Customized Services

Sycamore Wealth Management of UBS Financial Services, Inc.

Lori Daffron has 30 years of experience in the financial services industry, a valuable attribute in the eyes of her clients. As Senior Vice President - Wealth Management and Senior Portfolio Manager, she leads Sycamore Wealth Management, a multigenerational team including Harrison Croff, Vice President – Wealth Management; Rachael Stiny, Registered Client Service Associate; and Nicole Garfias, Client Service Associate.

"Our job is to protect our clients' lifestyles and we do this by learning about their life, family, and priorities," Daffron says. "We often work with our clients' CPAs and attorneys to ensure that we collectively address their investment, tax, financial, and estate planning needs."

Sycamore's clients tend to be extended families and multigenerational. "We have deep relationships with select estate planning attorneys and CPAs who provide referrals following significant life events – the passing of a spouse, significant liquidity, or the need for more complex planning," says Daffron. "We are able to address big picture issues."

Lori Daffron

Diverse Team Serves Wide Range of Clients

Sycamore Wealth Management has evolved as a dynamic team by design, offering clients a range of perspectives and the ability to gravitate towards one advisor or the other. "Clients tend to be much more open when they connect with a member of our team," says Croff.

"As a team with a shared vision, we rely on each other to reinforce the stability our clients have come to expect," says Daffron. "Above all else, we strive to build lasting relationships through customized service, integrity, and continuity."

Global Insight, Local Service

As part of UBS, Sycamore delivers a personalized, boutique investment firm feel and experience, backed by the global resources of the world's largest wealth manager. "UBS is truly a global firm, providing relevant and timely information on events around the world which may impact our clients and how we manage their assets," says Daffron. "UBS's resources make our team more capable of delivering on our value proposition."

Daffron, who became a Certified Financial Planner in 1996 and has been on *Forbes*' America's Top Women Advisors and Best-In-State Wealth Advisors lists for the past two years, uses a defined process to give clients advice as they navigate life's inevitable changes. The process breaks client goals into three parts: Liquidity, Longevity and Legacy. "Clients are at the center of the process," Daffron explains, "and the optimization of the portfolio is based on their benchmarks."

She is thankful to have had the responsibility and privilege to work in partnership with long-term clients for so many years. The relationships she has developed make the work especially rewarding. "We are inspired every day by the trust and confidence our clients bestow upon us," she adds.

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