Wealth Advisory Group: Investments

Brian W. Formento, CAIA
Executive Director, Senior Portfolio Strategist
212-821-7065
brian.formento@ubs.com

Responsibilities

Brian is responsible for articulating and delivering comprehensive, research-driven asset allocation and portfolio strategy advice to our Private Wealth Advisors and their ultra high net worth clients. He is a senior member of the Portfolio Advisory Group covering the Northeast region with $29 Billion in client assets under management. Brian is also a member of the Private Wealth Management Alternatives Advisory Board and Private Wealth Management Family Office Strategy Team.

Professional history

Before joining UBS in July 2006, Brian was a Managing Director and senior investment consultant for structured products and alternatives at Deutsche Bank Private Wealth Management. Previously, he has held senior positions in various private investment advisory firms and was a senior vice president, head of proprietary fixed income trading and desk head of the primary dealer at Paribas Capital Markets, now BNP Paribas. He was also a member of Paribas' Executive Risk Committee and involved in the firms strategic planning. He began his career at Merrill Lynch, where he held key trading positions primarily in derivative products.

Education

Brian graduated magna cum laude and with distinction, receiving a B.A. and M.A. in Economics from Boston University and is a member and past chair of the Economic Department's Board of Advisors for the undergraduate college and graduate school. Brian, a Chartered Alternative Investment Analyst (CAIA) is also a member of the Structured Products Association (SPA) as well as the Professional Risk Managers' International Association (PRIMA). He currently holds the following registrations; 7,24,3,63,66,55, and Life and Health Insurance.

Language

English