The UBS team
Charities

David Rowe
Managing Director - overall responsibility for UBS's Charities business

David's 26 years in the investment industry have always focussed on investment management and the charity sector. Prior to UBS, he spent 16 years at Schroders, initially as a fund manager specialising in UK and global equities before concentrating on the charity market. He was Managing Director of Schroders Private Bank between 1999 - 2002. He is a trustee of the Soldier, Sailors, Airman and Families Association (SSAFA). He has a degree in Economics from Exeter University and is a Chartered Fellow of the CISI and a visiting lecturer at Cass Business School.

Andrew Wauchope
Head of Charities

Andrew has specialised in investment management and the charity sector throughout his 27 years in the industry. He trained at Quilter Goodison, moving to Gerrard Vivian Gray, before joining Laing and Cruickshank (now UBS) as an Investment Director in 1998. Andrew has looked after many of his charity clients for a number of years. He has been a trustee and Investment Committee Member on the Court and Investment Committee of his livery company and a large educational charity. He holds a degree in History and Politics from London University and is a Chartered Fellow of the CISI.

Professor Paul Palmer
Professor of Voluntary Sector Management and Associate Dean for Ethics, Sustainability and Engagement, Cass Business School

Paul is an independent consultant on charities to UBS Wealth Management, having extensive knowledge of charity financial, management and governance issues. He was a member of the Charity Commission SORP committee from 2000-2005. His work has extended into the field of Corporate Social Responsibility and he serves on the ethics panel of the Securities Investment Institute and the Corporate Responsibility Advisory Group of the ICAEW.

Jonathan Diamond
Client Advisor

Jonathan has worked at a number of investment houses over the past 20 years, including James Capel and Rathbones, managing segregated, multi-asset, global portfolios for wealthy individuals, UK charities and pension funds. Prior to joining UBS he worked in a family run automotive technology business. Before moving into financial services, Jonathan served with the British Army for six years. He is a Member of the CISI and a visiting lecturer at Cass Business School.

Yogita Rajani
Client Advisor

Yogita managed segregated, multi-asset, global portfolios for UK charities and wealthy individuals at HSBC Private Bank prior to joining UBS and has over 11 years industry experience. At UBS she is responsible for providing investment management advice to a wide range of charity clients. Yogita regularly volunteers at her local cancer support charity and is a trustee and Investment Committee Member of St Catherine's Hospice, Sussex. She holds a degree in Economics and Finance from Brunel University and is a Fellow of the CISI. She is currently completing a Masters in Charity Finance and Accounting at Cass Business School.

Pradeep Kachhala
Client Advisor

Pradeep Kachhala worked at both State Street Global Advisors and Heptagon Capital before joining UBS in 2006. Initially providing bespoke portfolio analysis for Ultra High Net Worth clients in 2011 he joined the charity team as a client advisor. Pradeep holds a degree in Economics from the City University London and a Masters in Wealth Management from the CISI. He has recently been appointed as a Trustee of The Boxing Academy.

Harry Pope
Client Advisor

Harry joined the UBS Wealth Management charities team as a client advisor in 2008, prior to this he worked at both Citi and Bear Stearns. Harry holds a degree in Spanish from Leeds University and is currently studying towards the CISI Diploma in Wealth Management having passed the Private Client Investment Advice and Management paper with a Merit. He holds the Investment Management Certificate.

Juliette Parker
Senior Administrator

Juliette has over 12 years investment industry experience. She joined UBS Wealth Management in 2000 and specialises in Charity administration. She and her team work closely with the client advisors to provide administrative support for charities clients. She has a degree in Marketing and Spanish from the University of Glamorgan.

Harjinder Bhatti
Administrator

Harj joined UBS in 2008, specialising in charity administration and has over five years investment industry experience. He has a degree in Financial Services from Sheffield Hallam University and is currently studying towards the CISI diploma in Wealth Management having passed the Private Client Investment Advice and Management paper.

Luke Murphy
Administrator

Luke has over seven years investment industry experience. He joined UBS Wealth Management in 2005 and specialises in charity administration. Luke works closely with the client advisors to provide administrative support for their clients.

Tracey Dockett
Personal Assistant

Tracey joined UBS as a Personal Assistant in 2002, having previously worked for Deloitte & Touche, Barclays Private Bank and Schroders Private Bank.

"Your client advisor will be in regular contact to talk about the impact of shifts in the market and to discuss possible tactical changes to your investment approach."

Information as of September 2012

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