UBS

Jeff Brooks
Senior Wealth Strategist

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Responsibilities
Jeff works with ultra high net worth clients of UBS helping coordinate investment, estate planning and philanthropic goals. Jeff focuses on developing and implementing creative and comprehensive strategies to assist clients with their complex financial needs such as preservation, transfer and management of wealth. He also reviews clients' estate planning documents to help ensure that the plan accurately reflects the family's philosophy, needs and objectives.

Education
Jeff received a B.J. from University of Missouri at Columbia and his J.D. from University of Missouri-Columbia Law School.

Professional History
Prior to joining UBS in 2010, Jeff worked for the Private Bank at Merrill Lynch and Bank of America for 12 years. Jeff practiced law with the law firm of Nichols and Challis in St. Louis, MO, focusing on probate, trust, estate tax and income tax planning for ultra high net worth individuals, families and business owners. Jeff began his legal career as an attorney for the Probate Division of the Circuit Court of St. Louis County.

Affiliations
Jeff is a member of the American Bar Association, the Missouri Bar Association, the Beverly Hills Estate Planning Council and the Cowboy Lawyers Association. Jeff also serves as a faculty member of the American Bankers' Association Trust School.

Recent Publications and Speeches
Regular presenter on recent fiduciary litigation, Beverly Hills Estate Planning Council 2011-2012

Speech to the San Gabriel Valley Estate Planning Council: The IRS's Dirty Dozen, February, 2012