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WEALTH ADVISORS

December 19, 2017

Carrie King Joins Ullmann Brown Wealth Advisors as Director of Trading & Compliance

Jacksonville Beach, FL – December 19, 2017 – Carrie King has joined Ullman Brown Wealth Advisors as Director of Trading and Compliance.

In this role, Carrie will be responsible for the company's overall trading and compliance programs. She will work closely with the firm's wealth advisors to implement portfolio decisions to ensure client assets are invested according to Ullmann Brown's customized investment solutions. Carrie will also be responsible for ensuring frameworks are in place so that the firm mitigates risk by remaining compliant with securities laws.

Ullmann Brown Wealth Advisors provides a diverse range of wealth management services, from investment to advanced planning needs. The firm empowers its clients with a customized, systematic process to help in achieving overall financial health.

"We are fortunate to have Carrie join our team," said Glenn Ullmann, Co-Founder and Partner of Ullmann Brown Wealth Advisors. "Carrie's background in trading and operations will help us continue to offer an improved operational experience for our clients, especially as our client base continues to grow."

"Carrie brings extensive knowledge, experience and efficiency to our organization," said Deanna Brown, Co-Founder and Partner of Ullmann Brown Wealth Advisors. "We are thrilled to have someone of her caliber join our firm."

King brings almost 20 years of experience in the financial industry. Prior to joining Ullmann Brown Wealth Advisors, Carrie was with Water Street Capital (Jacksonville, FL) where she served as a trader and analyst for a multi-billion dollar portfolio and also had operations responsibility. Prior to her tenure at Water Street, Carrie worked at Ergon Capital (Jacksonville, FL). King earned an MBA from University of North Florida and a BBA from Florida State University.

About Ullmann Brown Wealth Advisors

Ullmann Brown Wealth Advisors is a registered investment advisor located in Jacksonville Beach, FL. In pursuit of goals defined in partnership with its clients, Ullmann Brown Wealth Advisor's approach to wealth management combines best practices in investment management, advanced planning, and coordination with clients' other expert professional advisors. It is a wider perspective that is bigger than financial products and market returns. It is a process, carefully mapped, monitored and refined. The firm's client relationships are a true collaboration built on leadership, openness, care and proactivity.

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