Ullmann Financial
A PLAN FOR LIFE

March 18, 2016

Brian James Joins Ullmann Financial as Director of Investments & Wealth Advisor

Ponte Vedra Beach, FL - March 18, 2016 –Brian James has joined Ullman Financial as Director of Investments and Wealth Advisor.

In this role, he will be responsible for the company's investment management process, which includes setting asset allocation, selecting investments and monitoring client portfolios. He will work closely with the firm's other professionals to develop investment policies and strategies for clients.

Ullmann Financial 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.

"Brian positions Ullmann Financial to increase depth in our investment team and provide exceptional service," says Glenn Ullmann, Co-Founder and Partner of Ullmann Financial. "Our firm is dedicated to attracting talented professionals like Brian to join our team, especially as our client base continues to grow."

"With the addition of Brian to our team, we can better help families make and implement smart financial decisions so they can relax and enjoy life," said Deanna Brown, Co-Founder and Partner of Ullmann Financial.

James brings experience with some of the premier firms in the investment management industry. Prior to joining Ullmann Financial, James was with Water Street Capital (Jacksonville, FL) where he managed trading for a multi-billion dollar portfolio. He has also held positions at Oceanwood Capital Management LP (Boston, MA), K Capital Management LLP (Boston, MA), and Lehman Brothers, Inc., (Boston, MA and New York, NY). James earned an MBA at The University of Chicago's Booth School of Business and a BS in Finance from Miami University.

About Ullmann Financial

Ullmann Financial is a registered investment advisor located in Ponte Vedra Beach, FL. In pursuit of goals defined in partnership with its clients, Ullmann Financial'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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