

Business Connection



www.pleasanton.org

Catalyst • Convener • Champion

November 2023

Business Spotlight

The right moves for your financial future

The cornerstone of my service to clients is guiding them to reach their financial aspirations and enhance their overall financial wellness," said John Michael Vinci of UBS Financial in Danville.

Building strong relationships with clients is a top priority, as it allows him to provide personalized advice and guidance based on each individual client. Whether it's retirement, investment strategy, or estate planning, John Michael works closely with his clients to ensure that all aspects of their financial lives are addressed. As an Accredited Asset Management Specialist™ and Accredited Wealth Management Advisor™, John Michael can provide clients with the advice, insights and customized solutions they need to pursue what's important to them now and in the future.

As a financial advisor, I uphold a client-centric approach that places my clients' unique financial objectives and aspirations at the heart of my practice. I prioritize the individual needs of each client, investing time in comprehensively understanding their specific circumstances, risk tolerance, and long-term goals. My approach is holistic, encompassing all aspects of their financial lives, including investments, retirement planning, taxes, insurance, and estate planning.

Effective and transparent communication is a cornerstone of my service, where I break down complex financial concepts and maintain an open dialogue to keep clients informed and engaged in their financial journey. I adhere to the highest ethical standards, always acting in the best interests of my clients and avoiding conflicts of interest. I tailor investment strategies to align with their unique financial objectives and risk tolerance. Risk management and insurance are key components of my strategy to mitigate unforeseen events and market volatility. Additionally, I am well-versed in tax-efficient strategies to optimize their financial



John Michael Vinci

positions. My goal is to provide each client with personalized, objective, and comprehensive financial guidance, empowering them to achieve their financial goals and secure their financial future.

With more than 13 years in financial services, John Michael Vinci is a Senior Vice President-Wealth Management and Financial Advisor for UBS Financial Services, which has a boutique feel with a global powerhouse of asset management.

"I find genuine satisfaction in helping individuals and families achieve their financial goals, secure their futures, and navigate life's financial challenges," said John Michael. "It's deeply rewarding to see my clients' financial well-being improve and to know that I've played a role in their success and peace of mind."

UBS – John Michael Vinci

4105 Blackhawk Plaza Circle Danville, CA 94506

Phone: 925-746-0274 JohnMichael.Vinci@UBS.com



UBS