



Mazel Tov & Congratulations



Five Star: Gene Marx Selected Among the Best in Client Satisfaction Wealth Managers

Charlotte Magazine formed a partnership with Crescendo Business Services, an independent research firm, to identify the "best in client satisfaction" wealth managers serving the Charlotte area. In January, Crescendo surveyed, by mail and phone 38,250 high-net-worth residents in the Charlotte area and subscribers of Charlotte Magazine. An additional 3,500 surveys were sent to leaders of financial service industry companies.

On the surveys, recipients were asked to select only wealth managers whom they knew through personal experience, and to evaluate them based upon nine criteria: customer service, integrity, knowledge/expertise, communication, value for fee charged, meeting of financial objectives, post-sale-service, quality of recommendations and overall satisfaction.

By February, stacks of surveys had arrived and Crescendo began carefully scoring each wealth

manager. Both positive and negative evaluations were included in the scoring. Only wealth managers with five years of experience in the financial services industry were considered.

Next, each wealth manager was reviewed for regulatory actions, civil judicial actions and customer complaints as reported by FINRA (the Financial Industry Regulatory Authority) and other regulatory agencies.

Then, before finalizing the list, wealth managers were reviewed by a blue-ribbon panel. The blue-ribbon panel was comprised of knowledgeable individuals from within the financial services industry. Although panelist comments were incorporated into the final score, safeguards were built into the review process to reduce the ability of panel members to influence the composition of the final list on the basis of company affiliation.

The resulting list of 2009 Five

Star Wealth Managers represents those wealth managers in the Charlotte area, that scored highest in client satisfaction. These wealth managers represent less than 5% of the wealth managers in the Charlotte area.

Included on this list are Gene Marx and Catherine Hunter Kloppenborg of UBS Financial Services.

Gene is Senior Vice President of Investments. He has been focusing on the Financial Planning and Investment Consulting needs of his clients for 19 years. Gene received his undergraduate degree from UNC - Chapel Hill and earned his MBA from Tulane University in New Orleans. He and his family are members of Temple Beth El.

Catherine is an Investment Associate at UBS Financial Services. She is a Certified Financial Planning Practitioner and has worked with Gene for over eleven years. Catherine

received her undergraduate degree from the University of Georgia.

About Marx Wealth Management

Marx Wealth Management is a team of UBS professionals dedicated to offering a customized approach to wealth management built on a personal relationship and shaped by an understanding of client needs and aspirations. Current and future assets can be analyzed, liabilities weighed and estate planning strategies implemented. We offer periodic reviews to determine if your investment strategies remain aligned with your goals, and proactively propose and implement solutions.

About UBS

UBS is one of the largest fully integrated financial services companies in the world. It is the world's largest Wealth Manager



Gene Marx

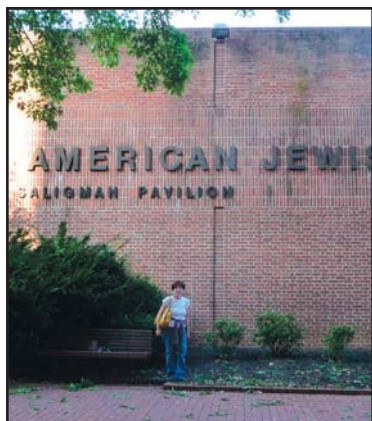
and Private Bank offering a wide range of products and services to deliver comprehensive solutions to its clients. ☆

The Jewish Traveler

By Maxine Silverstein

PHILADELPHIA, PA

I always wanted to visit Philadelphia and this past October I got my wish. Philadelphia is called the City of Brotherly Love and it's a good motto for its Jewish community. With its treasure of historic sites and myriad of other attractions, America's fourth-largest Jewish community and fifth-largest city are worth getting to know. With a wonderful history reaching back to colonial times, Jews are inseparably linked to the city. And Philadelphia Jewry has been powerful in national Jewish affairs, both past and present.



Maxine visits the National Museum of Jewish History.

Jews visited Philadelphia as early as 1707 but the first Jewish settlement dates back to 1737. The early Jewish residents, of Ashkenazic and Sephardic background, flourished under the liberal influence of the dominant Quakers and played important roles in colonial Philadelphia life. Today over 300,000 Jews reside in metropolitan Philadelphia.

Mikveh Israel, which they translate as "The Hope of Israel,"

was founded in 1740 and is an unparalleled American Jewish Institution. It shares its quarters at one end of Independence Mall with the National Museum of American Jewish History. The synagogue and museum are just a short walk from Independence Hall and the Liberty Bell. The museum is very interesting. It's the only institution of its kind dedicated to telling the story of Jewish participation in the growth and development of North and South America. It houses many personal and religious items that belonged to colonial Jews. This wonderful museum was established in 1976 for America's Bicentennial. The museum's collection has grown to more than 20,000 artifacts, which resonate with the history of more than 350 years of America Jewish life. We found this museum to be incredibly interesting and educational.

Congregation Mikveh Israel is one of the first organized Jewish congregations in this country. It also so interesting that these two Jewish sites share their space together. Congregation Mikveh is also known as the "Synagogue of the American Revolution." Mikveh Israel is the direct descendant of the original synagogue founded in 1748.

Save some time to see Independence National Historical Park. This area encompasses several square blocks in the heart of Old City. It is rightfully called "America's most historic square mile." Many of Philadelphia's most famous sights-including the Liberty Bell and Independence Hall-are conveniently located within this compact and attractive area.



Maxine at the Liberty Bell.

This amazing vibrant city is filled with wonderful museums, fabulous restaurants, amazing shopping and a first class zoo located in Fairmont Park. We did get to visit the zoo which is the nation's oldest and a child's paradise. Philadelphia intrigued me and I know that I will be back for a longer visit. It's a city that is a wonderful combination of the old mixed with the new. ☆



At the religious liberty monument.

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