

# Liam McCormick

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Executive Director  
Senior Strategist, Central Division  
Family Advisory and Philanthropy Services Americas

## **Professional History**

As a Senior Strategist with Family Advisory and Philanthropy Services Americas, Liam works with families helping them understand their relationship with money, values and philanthropic intent. Focus is placed on the intersection of the five types of capital; human, intellectual, social, foundational and financial. Family Advisory and Philanthropy Services is a thought partner to Financial Advisors and exceptional client families supporting wealth transition, family governance, and philanthropy as families seek guidance in developing cohesive strategies to bridge generations and build legacy.

Prior to UBS, Liam stewarded relationships with high impact donors for a number of international organizations, including Habitat for Humanity, Opportunity International UK and The Prince's Trust. As a consultant, he developed leadership development programs with the Prince's Trust and Kore Venture equipping young inheritors to navigate the complexities of wealth. A former British Army Officer with international experience in command, staff appointments and training.

## **Community Involvement**

Liam is a board member of Young Life International, Senior coach for the Atlanta Youth Rugby under 12 Buckhead team, and member of the Vestry leadership team for Trinity Anglican Westside Church.

## **Education**

A graduate of Birmingham University in the UK, Liam continued his education at The Royal Military Academy Sandhurst, where the motto 'serve to lead' informed his leadership style. He holds an executive coaching advanced certificate from University of the West of England and leadership coaching certificate from the Resurgo Trust. Liam lives in Atlanta with his wife and three sons.

As a firm providing wealth management services to clients, UBS Financial Services Inc. offers investment advisory services in its capacity as an SEC-registered investment adviser and brokerage services in its capacity as an SEC-registered broker-dealer. Investment advisory services and brokerage services are separate and distinct, differ in material ways and are governed by different laws and separate arrangements. It is important that clients understand the ways in which we conduct business, that they carefully read the agreements and disclosures that we provide to them about the products or services we offer. For more information, please review the PDF document at [ubs.com/relationshipssummary](https://ubs.com/relationshipssummary).

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