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Wetherby NEWS

FROM THE CEO

Brandon Smith Joins Wetherby as Director of Estate Planning

Wetherby Asset Management is proud to welcome Brandon Smith to our team. As Director of Estate Planning, he works alongside our client service team to support our clients with their estate planning needs. His addition to the team adds considerable strength and depth to our existing estate planning and tax expertise, notably in the areas of equity compensation, intergenerational wealth transfer and charitable planning.

“Brandon stands out to us not only for his exceptional technical expertise in estate planning and tax law, but also for his attention to building trusted and caring relationships with clients” commented Deb Wetherby, Founder and CEO. “He will help to enhance our estate planning capabilities and deliver holistic advice to preserve the wealth and legacy of each client.”

Brandon joins us with extensive experience serving the sophisticated financial and estate planning needs of high net worth individuals. Prior to Wetherby, Brandon had risen to the role of Director and Wealth Strategist at UBS Financial Services where he created custom financial plans and provided advanced planning advice for the firm’s wealthiest clients. He has also worked at a patent research start up and served as a Trust and Estates Associate at several law firms.

Brandon received his Masters of Laws in Taxation from Northwestern University Law School, his J.D. from Vanderbilt University Law School and his B.A. from Wake Forest University. He is admitted to the bar for both the State of California and the Commonwealth of Pennsylvania.