



**UHLER
VERTICH
WHITE**
ADVISORS

An Independent Registered Investment Advisor

SUMMER 2023

The Navigator

MANAGING WEALTH. SERVING GENERATIONS.

Introducing Uhler Vertich White Advisors

Uhler & Vertich Financial Planners Merges with Scott White Advisors to form Uhler Vertich White Advisors (UVWA)

After nearly 20 years of working in tandem, we are excited to announce the merger of Uhler & Vertich Financial Planners and Scott White Advisors. This move comes after years of sharing office space, strategic planning, and collaboration between the two firms.

As full-service, white glove financial planning firms, we essentially use the same financial planning process and share the same investment philosophy. We have also shared the same staff, and even the same phone line and office lobby, making this merger a natural next step for both practices.

From the 2023 Alliance of the Arts event are UVWA team members pictured left to right, Tom Uhler, Gary Geston, Corey Vertich, Becky Pardue, Kelly Jelenchick, Darlene Mayhak, Scott White, and Bryan Fiore. Not pictured: Janelle Lewis, Shane Carrier



Our primary goal in this merger is to provide comprehensive coverage for both firms in the most efficient way, ensuring that our clients receive the same high-quality service they have come to expect from us for years to come. This includes a move from, “waiting in the wings if there is a need,” to a true merger that covers our lead financial planners as well as the collective interest and well-being of our clients long term. Now, the necessary legal arrangements and consolidation with Raymond James have also been finalized.

What does this merger and name change mean for you?

While there will be a name change to Uhler Vertich White Advisors and a newly associated Registered Investment Advisory (RIA) firm, the staff and financial advisor with whom you are used to and comfortable working with will remain the same. The continuity in your team also ensures continuity on the level of service that you’re accustomed to receiving. We believe that this merger is in everyone’s best interest and will only enhance the services provided to clients. After June 1, you may see the new RIA name change on your statements and in your online Raymond James Client Access site.

As Uhler Vertich White Advisors, we will remain committed to delivering the same high level of personalized, financial planning and wealth management services that our clients have come to expect. We are thrilled about the future of Uhler Vertich White Advisors and look forward to continuing to serve you with the same level of care and dedication that has defined our practices.

If you have questions, reach out to us at (239) 936-6300, and Becky Pardue will be happy to help find an answer, as she always does.

Here’s to our collective futures!

The term “Independent Registered Investment Advisor” or “Independent RIA” means the firm is independent of its affiliation with its broker/dealer, Raymond James Financial Services, Inc. member FINRA/SIPC. Any reference to the term “RIA” should not be interpreted as a credential nor does it imply a certain level of skill or training or that such firm or person has been sponsored, recommended, or approved, or that their abilities or qualifications have in any respect been passed upon by the United States or any agency or any officer thereof.

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