



Daniel Gleason '05

Senior Vice President — Wealth Management
UBS

Dan finds fulfillment in sharing his industry knowledge to help others plan for a financially sound future. He works with privately held business owners focusing on succession planning, along with corporate executives, attending to their individual needs. All his clients value his preparation and attention to detail. Dan prides himself on seeking to ensure his clients' success through comprehensive financial and estate planning strategies.

Dan and the entire Veritas team believe that treating people like family is just as important as the state of their portfolios. He strives to help clients in any way, from cooking a meal in times of turmoil to helping them purchase new cars. Dan considers himself a connector—someone who will get on the phone with a mortgage broker, talk to clients' estate or tax attorneys, educate their children on budgeting college expenses and do whatever possible for a client's total well-being.

Dan graduated with a B.S. in finance from Providence College. After starting his career as a financial advisor at Morgan Stanley, he transitioned to UBS in 2006. He is a Certified Financial Planner™ (CFP®) and holds the Series 7, 31 and 66 securities licenses, as well as major insurance licenses, including health, life and accident. Dan is also a licensed mortgage originator, NMLS #1630780.

Dan's commitment to helping people is an integral part of his personal life as well. Dan volunteers for The Center for Career Education and Professional Development at Providence College, providing advice to students who wish to enter the financial services industry. On behalf of his UBS clients, he also makes regular donations to the Greater Boston Food Bank.

Dan, his wife, Katelyn, and their sons, Theo and Tucker, live in Norwell, and enjoy spending time at their vacation home on Cape Cod. Dan's personal passions extend far and wide—from traveling and adventuring with his family to boating, saltwater fly-fishing, skiing and attending car shows.