

Julie A. Binder



Executive Director
Senior Strategist, East Division
Family Advisory and Philanthropy Services

Professional history

As a Senior Strategist with Family Advisory and Philanthropy Services, Julie works with families on understanding money, values and philanthropic intent in the family wealth context and the dynamic overlap of five types of capital—human capital, intellectual capital, social capital, foundational capital, and financial capital. Family and Philanthropy Advisory is a thought partner to advisors and their exceptional client families on wealth transition, family governance, and philanthropy as families seek guidance on cohesive dialogue between generations to perpetuate their legacy.

UBS Financial Services Inc.

1285 Ave of the Americas
15th Floor
New York, NY 10019

212-649-8049
julie.binder@ubs.com

Prior to joining UBS Financial Services in 2018, Julie was with Foundation Source, a provider of comprehensive support services for private foundations for nearly a decade. While there, she was responsible for understanding the needs and identifying philanthropic solutions for ultra-high net worth clients and the Private Wealth Advisors who serve them. Julie worked with hundreds of clients to think about the impact of their philanthropy on their families and communities. Before Foundation Source, Julie worked for a boutique consulting firm that specialized in corporate philanthropy, and spent several years in business development for Texas Monthly and New York Magazine.

Education

Julie graduated from the University of Connecticut with a B.S. in Marketing and holds a Fellowship in Charitable Estate Planning from the Charitable Estate Planning Institute. She is an active volunteer with many local community organizations, and lives in Stamford, CT with her husband and two sons.

Languages

English

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