

Lightning in a Bottle

Private Equity & Debt Sector Update (2023 Recap + 2024 Outlook)

Join us for a roundtable discussion featuring a recap of 2023's private equity and debt market activity, along with expert insights on what to expect in 2024.



Guest Speakers



Bob Glowniak
Managing Director
Investment Banking
KPMG Corporate Finance LLC



Mike Rudolph
Managing Director
Corporate Finance
KPMG Corporate Finance LLC

Hosted by ATX Wealth Partners



Jason Chirogianis, CEPA®
Senior Vice President Private
Wealth Advisor UBS
Financial Services Inc.



Josh Pottinger, CIMA®, CEPA®
Senior Vice President
Private Wealth Advisor
UBS Financial Services Inc.

Tuesday, January 23
6:00 PM – 8:00 PM CST

RSVP
Please RSVP [HERE](#)

Location
Details provided upon RSVP

ATX Wealth Partners
UBS Financial Services Inc.
98 San Jacinto Blvd. Suite 600
Austin, TX 78701

UBS Financial Services Inc. does not provide legal or tax advice and this does not constitute such advice. UBS strongly recommends that persons obtain appropriate independent legal, tax, and other professional advice.

Please note that the views presented by third party speakers are their own views and may not necessarily be the same as those of UBS Group AG and its affiliates. UBS does not attest to the accuracy and completeness of any information or associated materials provided by them. UBS makes no recommendation in relation to them or their services.

This presentation is for informational and educational purposes only and should not be relied upon as investment advice or the basis for making any investment decisions. The views and opinions expressed may not be those of UBS Financial Services Inc. UBS Financial Services Inc. does not verify and does not guarantee the accuracy or completeness of the information presented.

KPMG and UBS Financial Services Inc. are not affiliated.

CIMA® is a registered certification mark of Investment Management Consultants Association Inc. doing business as Investments & Wealth Institute® in the United States of America and worldwide. For designation disclosures visit <https://www.ubs.com/us/en/designation-disclosures.html>

Do not attend this event if you have any of the following: Symptoms of COVID-19 (which may include cough, shortness of breath, chills, muscle pain, headache, sore throat, loss of taste or smell, nausea or vomiting, diarrhea, congestion or runny nose not related to allergies). Fever of 100.4 degrees Fahrenheit (F) or higher. Pending viral test for COVID infection due to symptoms. Diagnosis of COVID infection in the prior 10 days. Close contact to someone with COVID during the prior 14 days.

Important information about brokerage and advisory services. 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 you understand the ways in which we conduct business and that you carefully read the agreements and disclosures that we provide about the products or services we offer. For more information, please review client relationship summary provided at ubs.com/relationshipsummary.

© UBS 2023. All rights reserved. The key symbol and UBS are among the registered and unregistered trademarks of UBS. UBS Financial Services Inc. is a subsidiary of UBS Group AG. Member FINRA/SIPC. IS2302988 Exp.: 5/31/2024