Seasoned financial pros combine skills to form Sailfish Wealth Management Group

Jennifer Whiting, a member of the Treasure Coast community. This story is neither endorsed by nor affiliated with this site.

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STUART — Sailfish Wealth Management Group recently announced their formation within UBS Financial Services, Inc. The five person team includes financial advisors Lee Boughner, Michael Dadko, and Diane Dadko as well as administrative team Barbara Meinzinger and April Pearson. All three advisors have earned the respected designation of CERTIFIED FINANCIAL PLANNER®, which is a rare occurrence in the financial industry.

“Individually, each of us has high-level expertise in financial planning and investment management,” said Vice President Michael Dadko. “With the creation of Sailfish Wealth Management Group, we are now able to offer clients our combined specialties, during a time when value added is imperative to a family’s financial success.”

“What differentiates us is our ability to provide private financial service through an entire team of advisors while tapping into the resources of an international company. Our clients appreciate this and the relationships we’ve built with them over the years,” said Senior VP Lee Boughner.

Sailfish Wealth Management Group offers a comprehensive range of tailored wealth management strategies. The group specializes in estate planning, financial planning, and investment management. Sailfish Wealth Management Group and UBS Financial Services, Inc. are located at 712 SE Ocean Boulevard in Stuart, Florida. For more information, visit http://www.ubs.com/team/sailfishwmg, or contact Michael Dadko at 772-283-8201 or Michael.Dadko@ubs.com.

About the Sailfish Wealth Management Team

Vice President Michael Dadko, CFP®, has more than ten years of experience with UBS and PaineWebber, and specializes in investment management and financial planning. Dadko formerly served eight years in the United States Army as a Captain. In addition to his CFP® designation, Dadko has the distinction of being among a select class of UBS Financial Advisors who have earned the designation of “Wealth Advisor.”

Senior Vice President Lee Boughner, CFP®, CLU®, CIMA® has more than thirty years of financial expertise with UBS and PaineWebber. In addition to his CFP® designation, Boughner is a Chartered Life Underwriter® and Certified Investment Manager Analyst®. His areas of expertise include taxes, estate planning, and insurance. Boughner holds a B.S. from Michigan State University and is also a retired Lieutenant Colonel with the United States Air Force.

Financial Advisor Diane M. Dadko, CFP® is a Wealth Strategy Associate and has more than ten years of experience in the industry with Morgan Stanley, Merrill Lynch, and UBS. She holds both an M.B.A. and B.A. from California State University, Long Beach.

Senior Client Service Associate Barbara Meinzinger oversees all administrative and operational services, and specializes in security, tax and insurance needs. Meinzinger has more than thirty years of experience in the industry and holds Series 7 and 63 licenses. Meinzinger holds a B.A. from Greensboro College.

Client Service Associate April Pearson assists in preparing annual reviews and financial plans, and has been with UBS for over five years. Pearson is currently obtaining her A.A. at Palm Beach State College.

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