

Private Wealth Management

Maxwell Bardeen Jr.



Managing Director
Complex Director – Boston

Professional history

Beyond his day-to-day responsibilities overseeing the UBS Private Wealth Management office in Boston, Max has been an educator and mentor to hundreds of individual clients and Advisors. Throughout his tenure at UBS, he has held leadership roles, including Branch Manager at the highly successful 100 Federal Street Boston branch and member of the exclusive Director's Council of Advisors in nine of the last 10 years. He is also a 2002 recipient of the Ed Connolly Leadership Award, the most prestigious honor bestowed by UBS.

Max began his financial services career at Kidder, Peabody & Co. in 1977 as a financial advisor. From 1989-1995, his talents and dedication earned him a Senior Vice President position as Manager of Kidder, Peabody's Boston office. He was elected to Kidder, Peabody's Management Council in 1992 and 1993.

Max is Chairman of the Board of Big Sister Association of Greater Boston and is an active board member of the Francis Ward Paine Foundation. He has served as co-chair of the annual fund for the Dedham Country Day School and for the Noble and Greenough School. Max is also actively involved at the Perkins School for the Blind and South Norfolk Association for Retarded Citizens. Max and his wife, Beth, live in Dedham, MA, and have two children.

Education

Max is a 1971 graduate of Lafayette College in Easton, PA. He served in the United States Navy from 1971-1976. He is a graduate of the General Electric Experienced Management Development Course and completed the Darden School for Executive Education's Leadership and Management Program in 1998.