

Private Wealth Management

Stephen McCashin



Executive Director
Complex Director – San Francisco

Professional history

Stephen currently manages the ultra high net worth (UHNW) client segment in the Northwest region. His responsibilities cover the San Francisco and Palo Alto, CA, offices, as well as Private Wealth Management (PWM) satellites in Salt Lake City, UT, and Seattle and Bellevue, WA.

Stephen has been with UBS for 13 years, since the start of his career in the Graduate Training Program. Most recently, he served as the Complex Director for Northern California within the Wealth Management Advisor Group, overseeing six offices. Prior to that, he held several management positions within the firm, including Complex Director for Downtown Los Angeles, where he earned the title of 2011 Complex Director of the Year. Previously, he served as Branch Office Manager in Rancho Bernardo, CA. Stephen played a role in opening the Private Wealth office in Los Angeles, serving as acting manager for the office for eight months.

Stephen lives in Alamo, CA, with his wife, Jennie, and their two daughters and son.

Education

Stephen graduated from Penn State University with a degree in finance. He received his Executive M.B.A. from the Anderson School at UCLA.