



Mrs. Jacqueline Willens '70

MANAGING DIRECTOR, UBS FINANCIAL SERVICES INC.

Jacqueline H. Willens is a Managing Director— Investments in the 1285 Avenue of the Americas branch of UBS Financial Services Inc.

Jacqueline is a 1970 graduate of Queens College from which she received a B.A. degree in the field of Early Education. She later matriculated at St. John's University where she earned, in 1972, an M.A. degree in the same field. She taught, for six years, in various elementary schools within the New York City school system during the 1970s. Jacqueline, once her teaching stint was completed, successfully combined her hobby, philately, with commerce, and served, immediately prior to embarking on a career on Wall Street, as the Executive Vice-President of Metro Stamps, Inc. In this capacity she also served as a licensed auctioneer and conducted auctions of rare properties in venues such as Madison Square Garden.

Jacqueline joined Drexel Burnham Lambert, as an account executive, in 1984. The untimely demise of that firm led her to PaineWebber and her accomplishments there, and now, with the merger, at UBS, have been noteworthy. This success is best exemplified by the fact that, in each of her 27 years at UBS, she has been named to the firm's prestigious Chairman's Council. In each of the last nine years, Jacqueline has been named one of the most outstanding women Financial Advisors in the widely-publicized survey conducted by Barron's magazine. Barron's has also consistently included Jacqueline in "Americas Top 1200 Financial Advisors." Her enthusiasm and passion for her craft is apparent from these accolades. Jacqueline serves a diverse array of clients, both retail and institutional in character and her long tenure in this field has afforded her the perspective that has served her clients well in all varieties of market environments.



Jacqueline is an active benefactor of a number of charitable, civic and educational causes. At Queens College, Jacqueline and her husband Robert established the Robert & Jacqueline Willens Queens College Scholarship Endowment in 2012, which awards two scholarships annually to outstanding undergraduate students majoring in Accounting, Economics or within the division of Education who are involved in campus life and volunteer service. She is also, for example, a patron of the National Down Syndrome Society. Together with her husband, Bob, who is an Adjunct Professor of Finance at Columbia University's Graduate School of Business and the president of Robert Willens LLC, a tax and accounting advisory firm, Jacqueline designed and funded the "Robert and Jacqueline Willens Award for Tax Research," an award presented each year at the Business School's Recognition Ceremony to the graduating senior who has performed with distinction in the school's tax courses during the year.