



Princeton Investment Consulting

Multi-Generational Team

Marc Shegoski

Managing Director - Wealth Management

David Sears CFP®, CIMA®, CRPS®

First Vice President - Wealth Management

Teresa Treanor

Team Administrator

Lisette Hernandez

Senior Client Service Associate

Craig Leiderman

Managing Director - Investments

Marc Portnoy

First Vice President - Wealth Management

Ryan Iannuzzo CRPS®

Client Service Associate



100 Overlook Center, Ste 100
Princeton, NJ 08540

Our Team



L. Marc Shegoski

Managing Director – Wealth Management

As a Barron's Top 100 Financial Advisor in America and a Financial Times 400 Top Advisor, Marc has 39 years of experience building long-lasting relationships with non-profits, foundations, endowments, retirement plans, and high net worth clients. As a UBS Senior Institutional Consultant, a designation held by only 28 of UBS's top Institutional Consultants, Marc specializes in asset allocation, manager due diligence, portfolio construction, and trading dynamics.

Marc was a partner in the development of the UBS Institutional Consulting Group, previously named PRIME Asset Consulting at Paine Webber & Kidder Peabody. With deep experience beyond consulting, Marc was a founding partner of a New York Stock Exchange firm, a Director of the Office State Courts Administrator for the State of Missouri and a Consultant to the Special Investigation Commission of the New Jersey Senate.

The credentials that help build confidence:

- Barron's Top 50 Institutional Consultants, 2018
- Barron's Top 100 Financial Advisor in America
- Forbes Best-In-State Wealth Advisor
- Princeton Investment Consulting has been named the #1 Advisory Team in New Jersey by Barron's
- Financial Times 400 Top Advisor
- Financial Times 401 Top Retirement Plan Advisors
- Plan Advisor's Top 100 Retirement Plan Advisors, 2016
- A regular speaker at Barron's conferences, including the Top Teams Summit and Roundtable Summit
- Member of the Government Finance Officer's Association and a regular speaker at their conferences throughout the country
- Former board member of NAI, the largest privately held global commercial real estate brokerage network
- A current CPWA® candidate at The University of Chicago Booth School of Business
- B.A. degree, Rutgers College with distinction
- M.S. degree, Harry S. Truman School of Government, University of Missouri–Columbia, U.S. National Presidential Fellowship

Outside of UBS Marc is a board member of multiple charitable organizations in the greater Princeton-New Brunswick area and an adjunct instructor at Rutgers University and Rider University.



David Sears CFP®, CIMA®, CRPS®

First Vice President – Wealth Management

Recently named as a Forbes America's Top Next Generation Advisor, David has more than 12 years of experience working with a wide array of institutional clients and high net worth families. David supports the Princeton Investment Consulting group with portfolio construction, asset allocation, risk management, investment manager research, equity and fixed income trading, portfolio reporting and financial planning.

David is a member of the UBS Institutional Consulting Advisory Council, a group of 12 Institutional Consultants from around the country who advise the firm on all aspects of the institutional business. He joined UBS in 2007 as part of a select group chosen nationally to complete a focused wealth management and institutional consulting program.

The credentials that help build confidence:

- Barron's Top 50 Institutional Consultant, 2018
- Forbes America's Top Next-Generation Wealth Advisor - 2017 - 2019
- PlanAdvisor Top 100 Retirement Plan Advisors, 2016
- National Association of Plan Advisors Top 50 Under 40 - 2015
- UBS Top 35 Advisors Under 35 - 2017
- UBS Institutional Consulting Advisory Council Member
- Certified Financial Planner® Professional
- Certified Investment Management Analyst®
- Chartered Retirement Plans Specialist®
- CIMA Certification Commission Member
- B.S. degree in finance and economics from Rutgers Business School, Phi Beta Kappa





Craig Leiderman

Managing Director - Investments

Craig M. Leiderman has been employed by UBS Financial Services for twenty-five years. His expertise includes the analysis of fixed-income portfolios and recommending strategies to improve and optimize portfolio performance. Mr. Leiderman utilizes UBS's proprietary bond optimization and portfolio analytics system to customize solutions for institutional fixed-income clients. He has also worked as a financial analyst and asset allocation specialist. His educational qualifications include a CIMA from the Wharton School of Business, an MBA with high honors from Fordham University, with majors in finance and accounting. He also holds an undergraduate degree with honors from Syracuse University, specializing in finance.

Craig resides in New York City with his wife and two children. He is actively involved in the community. Craig spends countless hours on the weekends working with kids who are part of the Yorkville Youth Athletic Association. He is also a Board member for the 79th Street tenants association (group trying to provide better living on the Upper East Side).

Marc Portnoy

First Vice President - Wealth Management

Marc Portnoy has 39 years of experience in the financial industry and has been helping wealthy families and small businesses at UBS over the last 25 years. He employs his knowledge of open and closed end funds, exchange traded securities and equities to construct optimized portfolios for qualified and tax sensitive accounts. Marc graduated from the University of Florida with a Bachelor of Science in Chemistry.

Outside of UBS Marc is an avid cyclist, exploring the tarmac and trails of Central New Jersey for more than 30 years.



Teresa Treanor

Team Administrator

Teresa Treanor joined Princeton Investment Consulting in 2018 as our new Team Administrator. In this role, Terri works with our administrative staff to deliver exceptional client service and assists the team with preparing for client meetings, fixed income and equity trading and coordinating marketing and business development efforts. Throughout a successful 25 year career, she has filled many roles within the branch office, from branch cashier to Operations Manager, branch manager's assistant, senior registered client service associate & wealth strategy associate. Using the knowledge and experience she's gained throughout the years, Terri has proven herself to be a great addition to our team.

Terri understands the value personal connections bring to the financial services business. Her understanding of the markets and the needs of our clients as well as her ability to quickly adapt to changes make her the perfect person to oversee our day-to-day business.

Terri has her Series 7, 63, 65 and NJ Insurance Producer's licenses. In addition to being our team administrator, Terri is the CSA Coach for the Princeton, NJ office, setting objectives and helping other staff members drive results across the firm.

Lisette Hernandez

Senior Client Service Associate

Lisette Hernandez is a 23 year industry veteran and the first point of contact for incoming client and prospect requests for Princeton Investment Consulting. An integral part of the business, Lisette's patience, understanding of the financial services industry and ability to connect well with others makes her the ideal fit to be our lead CSA for all inquiries, new account openings and to act as our liaison between the team and branch operations/home office. Lisette also assists the team with security trading, margin reporting and scheduling.

Her passion for helping our clients has been consistent for over 23 years. She focuses on what's needed and then pools knowledge, advice and resources to arrive at the best solution. Listening is important during this process and Lisette excels at attention to detail. Her understanding of UBS processes enables her to quickly and accurately accomplish all tasks at hand.

Lisette holds both the Series 7 and 66 licenses.



Ryan T. Iannuzzo CRPS®

Client Service Associate

Ryan Iannuzzo has been with Princeton Investment Consulting for over three years and acts as a vital part of our institutional business. Passionate about constantly challenging himself and our team, Ryan is our point person for performance reporting, presentation preparation, daily client trading and RFPs. He strives to provide our clients with a unique and enhanced perspective through diligent attention to financial planning, goal setting and market awareness. A flexible and constant team player, Ryan showcases a unique ability to tackle multiple projects at once, assisting our team whenever needed to ensure timely and accurate delivery.

In 2019 Ryan was chosen from a National pool of his colleagues to participate in the UBS Rotation Program where he gained invaluable experience working with UBS Private Wealth Management.

Ryan is also an active member of the UBS Institutional Consulting Administrative and Operations Advisory Council. The Council consists of a select group of UBSIC Ops professionals that help shape and share best practices with UBS Institutional Consulting Teams nationally to improve the efficiencies of the firm's administrative and operational processes.

Ryan holds the Series 7, 63 and 66 licenses as well as the Chartered Retirement Plan Specialist (CRPS®) designation. He received his bachelor's degree in finance and marketing from Manhattan College's Business School.



Team Statistics



Average Tenure

Financial Advisors (4)	31.0 years each 124.0 years cumulative
Professional Support (3)	19.6 years each 59.0 cumulative

Titles / Internal Committees

Managing Director (2), First Vice President (2), Senior Portfolio Managers (3), Senior Institutional Consultant (2), Senior Retirement Consultant (2), Foundation & Endowment Consultant, EPAS , RIS, Member Institutional Advisory Committee, Member Institutional Operational Advisory Committee, Market Area CSA Coach, Insurance Licensed (5), Commodity Licensed (3), Sustainable Investing Certification, Certified Technical Analyst, Municipal Finance Professional (2), Team Administrator, Senior Registered CSA, Wealth Strategy Associate (pending)

Degrees & Certifications

MBA, MSPA, CIMA, CFP, CRPS, CPWA (pending)

Tools Utilized (specialized)

Aladdin, Informa, Qvidian RFP, MPI, FGA, Wealth Way, FirmPlus, Morningstar DCA, EPAS online, Zephyr, Bloomberg, Yield Book

