



Daffan Nettle
Managing Director – Wealth Management Private
Wealth Advisor
UBS

Daffan is a founding partner and a private wealth advisor for the C2 Advisors Private Wealth team. Daffan accesses the full range of the firm’s global solutions to address the multigenerational needs of successful families, business owners and private equity executives. She offers her private wealth management clients the insight of more than 10 years in the investment banking industry. Daffan clearly understands what they experience when undertaking a liquidity event and can prepare them

financially and personally. What’s more, Daffan’s in-depth knowledge of the credit markets enables her to seamlessly navigate the structuring of credit opportunities for her clients to consider.

Always striving to be the single point of contact for all her clients’ financial needs, Daffan is committed to a service promise that runs deep, and her advice is comprehensive, covering asset management, liquidity management, estate planning and philanthropy. She focuses on helping them simplify and make better decisions with their wealth but also serves a resource for everything in their daily lives—a role she welcomes. Her clients become like family.

Past experience

- Private Wealth Advisor, J.P. Morgan Private Bank
- Investment Banker, Frost Securities (middle-market private placements and mergers & acquisitions)
- Investment banking positions with RBC Capital Markets and Ernst & Young Corporate Finance

Recognition

- Barron’s Top 1,200 Financial Advisors, 2020 (Ranked #3 in Texas)

Professional credentials

- Series 7 and 63 securities licenses

Education

- M.B.A., finance, McCombs School of Business at University of Texas at Austin
- B.A., history, Southern Methodist University
- Trained as a CPA, passing all sections of the exam in one sitting

Outside of UBS

- Daffan’s husband and her 17-year-old identical twin daughters are her passions.
- They enjoy hiking and skiing and traveling to far-off locales.
- Daffan is a member of the Crystal Charity Ball, a member of the advisory council for the School of Undergraduate Studies at the University of Texas, and a member of the advisory council for the McCombs School of Business at the University of Texas.
- She is also a member of the Foundation Board for the YMCA.
- Daffan has chaired the Junior League of Dallas Ball, co-chaired the Genesis Women’s Shelter Mother’s Day Luncheon and chaired the Baylor Healthcare System’s Celebrating Women Luncheon.