UBS

Distinctive solutions for modern wealth

The Founders Group

Private Wealth Management

Our strengths

If it’s important to you, its important to us

The Founders Group works with a distinguished group of founders of high-growth, innovative companies, principles of premiere private equity and venture capital firm’s and family offices. Our team brings a process-oriented approach combined with innovative problem-solving and fully customized solutions to help you navigate the complexities of significant liquidity events and multigenerational family wealth.

Solutions for founders
Our team has focused on personal planning for founders of high growth companies since the early 2000s, delivering highly bespoke liquidity planning, tax mitigation strategies and, where appropriate, pre-IPO lending or introductions to UBS’s Global Banking franchise.

Solutions for private equity and venture capital principles
Principals who have worked for premier private funds have a significant portion of their net worth locked into unrealized carry, unable to access that capital until the fund’s wind-down. We advise these successful professionals on tailored lending solutions enabling them to unlock their carry and put it to work in a diversified portfolio, acquisition of a home or other life events.

Solutions for family offices
We harness the power of UBS’s institutional and wealth management resources UBS traders, bankers, analysts and sales teams in every market, product class and currency to serve the needs of successful family offices. Working with the **Family Office Solutions Group**, our clients benefit from UBS’s deep perspective on establishing family offices, industry trends, best practices, education, costs, communication, rising generation stewardship, reporting, staffing, concierge needs, structure and governance.

UBS’s pledge to net zero emissions

UBS takes action to reduce carbon footprint

As a founding member of the **Net Zero Asset Managers** initiative, UBS is committed to reaching net zero emissions by 2050 or sooner across all of our Asset Management division’s assets under management.

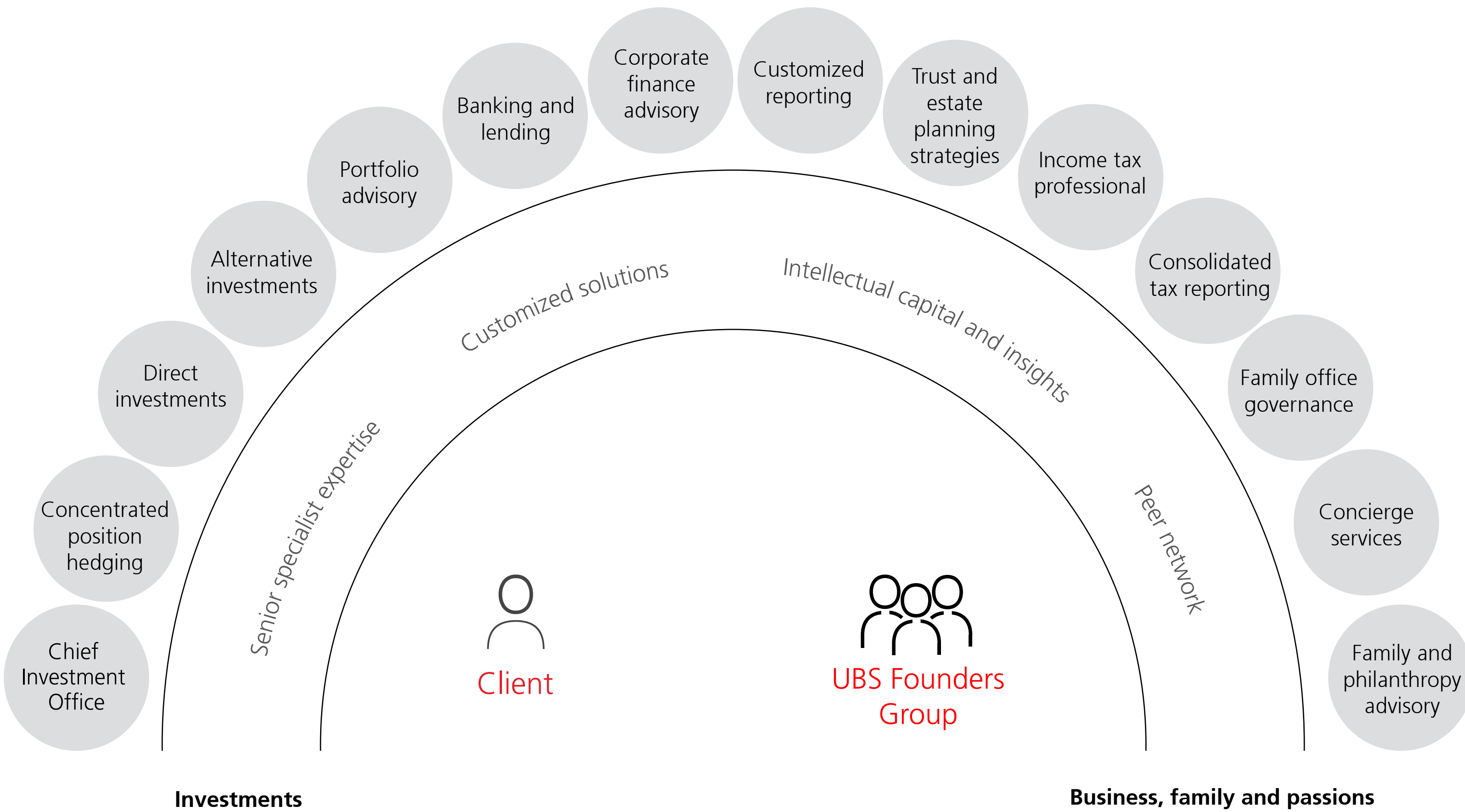
We’ve also made **sustainable investments the preferred solution for clients of our Global Wealth Management division.** Investing globally, we have transitioned our private pension product offering in Switzerland to sustainable investment solutions.

Our planet—collaborating with peers and experts: In addition to our efforts launching the Net Zero Asset Manager initiative (NZAM) in 2020 and our established work in the UNEP FI-led TCFD and climate risk program for banks, UBS is a founding member of the Net Zero Banking Alliance (NZBA), which launched in April 2021. The NZAM and NZBA constitute two key commitments to working collectively with our peers and experts with the aim of learning from and leveraging each other’s efforts. This collaboration bolsters the broader work we undertake within the framework of the Principles for Responsible Banking.

Our capabilities

Whether you're building a company or a family office, our strong relationships across UBS allow us to tap into the global resources of the world's largest wealth management firm on your behalf.

A planning foundation: The cornerstone of our services is a coordinated plan that addresses meaningful goals, both financial and philanthropic. Working with us, you'll find our solutions are highly personalized—sometimes atypical—and reflect our ability to see challenges as opportunities, not obstacles.



Team snapshot

As a UBS Private Wealth team, we purposefully maintain a small client-to-advisor ratio that enables us to understand thoroughly who you are and what you need. Expect nothing less than an exceptionally personalized relationship with global access to UBS expertise, investment platforms and an ecosystem of like-minded families, business owners, philanthropists and entrepreneurs with whom you can share common ground.

$812 million
assets under management
(as of 06/01/2021)

37 client households

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