The Greenly Group

Private Wealth Management

Managing wealth and life

We work with influential families, entrepreneurs and executives that are inspired to change industry, create meaningful legacies and make an impact on causes that matter most to them. Our goal is to understand the purpose for your wealth, while striving to build resilient investment portfolios that support your current and long-term goals.

What you can expect

Significant wealth can bring opportunities to pursue bold undertakings— in your ventures, with your family and the passions that give meaning and purpose to your life. How do you make decisions that can ultimately help you achieve your goals—large and small? Within The Greenly Group and UBS Private Wealth Management, it's all about connection and the ability to deliver an incomparable range of capabilities and solutions to improve the outcomes for now and generations to come.

Personalization

We understand you

We serve a small number of families in order to focus on the specific needs of you and your family in the context of a long-term relationship that extends across generations.

Customization

Solutions that move you forward

We tap our vast global resources to create a broad array of solutions that align with the purpose for your wealth.

Specialization

Thought leaders who enlighten you

Strategic perspectives across key wealth dimensions with direct access to financial experts internally and externally.

Collaboration

People and passions that inspire you

A network of like-minded peers—a community where you can discover mutual interests and build important relationships with entrepreneurs, investors, innovators, academics, scientists and philanthropists across the globe.

Personalization Who we advise

Multigenerational families

From first, second or third generation, to family foundations, managing wealth spanning many generations requires specialized knowledge and an understanding of complex family dynamics.

- Wealth preservation and building
- Estate planning
- Family advisory
- Rising-gen education
- Philanthropy
- Investments

Founders and entrepreneurs

Whether you're in the building, acquiring or liquidity phase, we can provide support along the entire journey. Our network of experts across UBS, as well as our external partners, will help you develop a personalized strategy that addresses a range of objectives.

- Pre- and post-sale liquidity strategies
- Financing opportunities
- Business succession
- Business community network
- Estate and tax planning considerations
- Investments

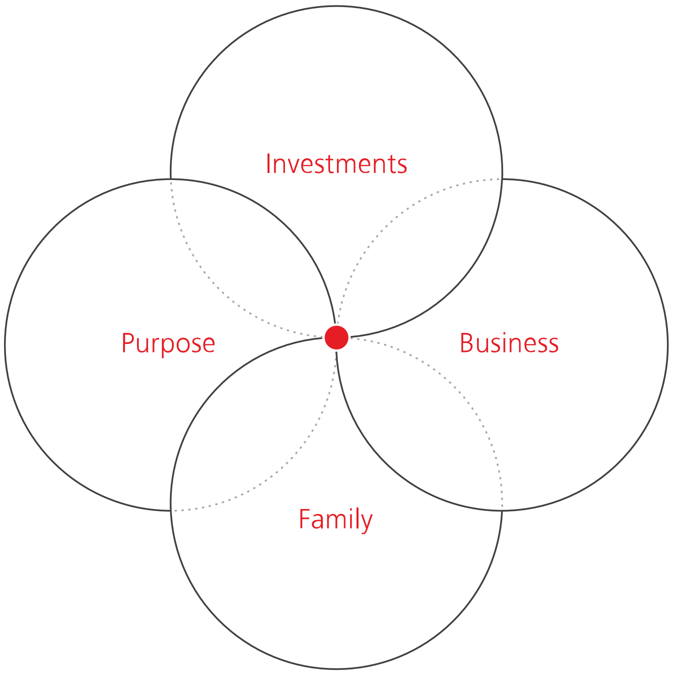
Corporate executives

From executing stock options or selling shares within a corporate window, we understand the complexities of executive wealth—and the potential tax consequences of not managing it thoughtfully.

- Equity awards management
- Liquidity management
- Investments
- Risk management
- Life transitions
- Estate planning considerations
- Investment bank services

Customization The integrated plan

Your investments. Family. Business. Passions. They are all interconnected. We customize an integrated, long-term plan that reflects the purpose for your wealth and all you want to accomplish.



Family

Creating a meaningful legacy

Like success, a legacy isn't built overnight. Creating a meaningful legacy requires long-term relationships built on trust and a deep understanding of your values.

Investments

Unlocking opportunity

You can expect bold and innovative solutions that are tailored to your needs. Let us be your sounding board to create new opportunities, explore risks and strive for reward.

Business

Expanding success over new horizons

Your business success is the foundation on which to build something even greater. With our expertise, we can help support your business through all stages.

Purpose

Turning passions into impactful pursuits

Wealth is much more than a collection of assets; it is a mark of your success, your heritage and your passion. We provide a network of experts and peers to help your passions become your legacy.

Specialization Diverse global resources and capabilities

Portfolio Advisory

Specialists focused on constructing customized investment portfolios to address your specific needs. The team's hallmarks include sophisticated quantitative analysis, research-driven asset allocation and tailored portfolio construction advice.

Tailored Banking and Lending

Tailored cash management and financing capabilities that align with your credit needs:

- Tailored lending
- Pre-IPO lending
- Cash management
- UBS credit cards
- Mortgages/Re-Finance

Alternative and Direct Investments

Direct access to a wide array of alternative investment solutions:

- Hedge funds
- Private equity and private credit
- Direct investments
- Real estate
- Impact/ESG

Family Office Solutions

Customized advice with a multigenerational approach exclusively for families who require bespoke and holistic advisory and planning solutions.

Family Advisory, Philanthropy and Advanced Planning

Advice and solutions to help families flourish for generations, including:

- Intentional communication and decision-making
- Intergenerational wealth transitions
- Estate and Tax Planning
- Family governance
- Philanthropic legacies and more

Collaboration The people and passions that inspire you

Your relationship with our team encompasses more than just your finances. We connect you to a community of like-minded experts and peers where you can discover mutual interests and build important relationships across the globe.

Global Philanthropists Community

This exclusive members-only network is supported by UBS and designed to connect active philanthropists with similar interests to encourage collaboration, exchange knowledge and create greater impact. Philanthropy is about finding solutions. We believe the best solutions are created when people work together.

Industry Leader Network

This digital platform offers business leaders a place to exchange insights and experiences.

In addition to the digital platform, members can participate in interactive workshops and networking events focused on topics relevant to the future of their business.

Collectors Circle

The Collector's Circle is a unique space hosted by UBS that allows visionary collectors and cultural philanthropists with the shared ambition of creating a lasting cultural legacy.

By bringing together collectors from all around the world, we can spark inspiration, explore new avenues and simply share the passion that drives us.

Annual UBS Thought Leader Programs

UBS programs provide you with he opportunity to expand your knowledge base and convene with peers to exchange ideas and best practices. Some examples include

- Entrepreneurs
- Women's Symposium
- Young Successors Program
- Family Wealth Symposium
- Philanthropy Summit

UBS

The Team

The Greenly Group has significant experience in servicing and delivering a wide range of solutions for ultra-affluent families. Our collaborative team approach and highly responsive client service process allows us to deliver a seamless experience for our families.

Michael Greenly, CIMA®
Managing Director—WM
Private Wealth Advisor
215-496-2006
michael.greenly@ubs.com

- Forbes/SHOOK Best-in-State Wealth Advisors, 2019, 2020, 2021
- Barron's Top 1200 Financial Advisors, 2022

Brittany McLaughlin, CEPA®
Authorized Officer
Team Business Manager
215-496-2051
brittany.mclaughlin@ubs.com

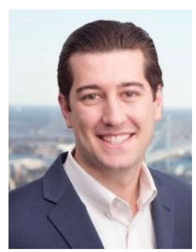
- Client experience
- Account administration
- Client solutions
- Team technology

Dom Daniele, CFP®, ChFC®
Senior Wealth Strategy Associate
215-496-2008
dominick.daniele@ubs.com

- Financial planning
- Portfolio allocation
- Investment solutions
- Performance reporting

Nikki Cerone
Associate Director
Wealth Management Analyst
215-496-2028
nikki.cerone@ubs.com

- Chief of staff
- Platform solutions
- Business development
- Marketing and events



Gabe Cabrera
Client Service Associate
215-496-2005
gabe.cabrera@ubs.com

- Account onboarding
- Account administration
- Money wires and transfers
- Tax reporting
- Online services

Important Disclosures

As a firm providing wealth management services to clients, UBS Financial Services Inc. offers investment advisory services in its capacity as an SEC-registered investment adviser and brokerage services in its capacity as an SEC-registered broker-dealer. Investment advisory services and brokerage services are separate and distinct, differ in material ways and are governed by different laws and separate arrangements. It is important that you understand the ways in which we conduct business, and that you carefully read the agreements and disclosures that we provide to you about the products or services we offer. For more information, please review client relationship summary provided at **ubs.com/relationshipsummary**, or ask your UBS Financial Advisor for a copy. In providing financial planning services, we may act as a broker-dealer or investment adviser, depending on whether we charge a fee for the service. The nature and scope of the services are detailed in the documents and reports provided to clients as part of the service. Financial planning does not alter or modify in any way a client's existing account(s) or the terms and conditions of any account agreements they may have with UBS.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the US, which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements. CIMA® is a registered certification mark of the Investment Management Consultants Association, Inc. in the United States of America and worldwide.

For designation disclosures visit **ubs.com/us/en/designation-disclosures.html.**

UBS Bank USA – Member FDIC – Equal Opportunity – Lender Equal Housing Lender. NMLS #947868.Deposits are insured by the FDIC up to $250,000 per ownership category (e.g., single, joint). Deposits are aggregated by ownership category for purposes of FDIC insurance. A UBS securities account is required to deposit funds at UBS Bank USA.

Borrowing using securities as collateral involves special risks, is not suitable for everyone and may not be appropriate for client needs. All loans are subject to credit approval, margin requirements, and margin call and other risks; credit lines may be subject to breakage fees. For a full discussion of the risks associated with borrowing using securities as collateral, clients should review the Loan Disclosure Statement included in their application package/account opening package. **UBS Financial Services Inc. (UBS-FS) and its Financial Advisors have a financial incentive to recommend the use of securities backed loans, rather than the sale of securities to meet cash needs because we receive compensation related to the loan as well as the investments used to secure the loan.** We benefit if your client draw down on their loan to meet liquidity needs rather than sell securities or other investments, and have a financial incentive to recommend products or manage an account in order to maximize the amount of the loan. UBS-FS and its Financial Advisors and employees offer banking and lending products to clients through our affiliates and third-party banks in our capacity as a broker-dealer and not as an investment adviser.

Neither UBS Financial Services Inc., UBS Bank USA, nor its employees (including its Financial Advisors) provide tax or legal advice. You should consult with your legal counsel and/or your accountant or tax professional regarding the legal or tax implications of a particular suggestion, strategy or investment, including any estate planning strategies, before you invest or implement.