

Empowering the Next Generation

Financial confidence for what comes next





UBS The Code

UBS **The Code** is a **financial education experience** created to make money topics more accessible, relevant, and engaging.

It focuses on financial literacy as a life skill, connecting it to everyday life, emphasizing long-term habits, and helping participants understand how thoughtful decisions around wealth today can shape the future.



We believe in the importance of not only preparing the assets for our heirs, but preparing our heirs for the assets.

Today's rising generation is curious, motivated, and eager to learn about money. From first investments and first homes, to side hustles and legacy planning, they're asking for clarity, confidence, and guidance they can trust.



Haggar Wealth Group is committed to supporting families across generations. That's why we continue to grow resources designed specifically for them, intended to **spark meaningful conversations and empower the next generation to engage more confidently in financial decisions.**

Popular Topics

Investing 101: Learn the fundamentals of investing, how markets work, and why long-term thinking, diversification, and discipline matter when building wealth.

Understanding Equity Compensation: Gain clarity around equity compensation and how these benefits fit into broader strategy and decision-making.

Budgeting and Saving: Build healthy money habits, understand cash flow, and learn how to balance enjoying today while planning for the future.

Starting Your Own Business: Explore the financial considerations behind entrepreneurship—from planning and funding to managing risk and growth.

Haggar Wealth Group

UBS Financial Services Inc.

100 Crescent Court
Suite 600
Dallas, TX 75201

214-932-8932

Check out UBS [The Code](#) here.



Melissa K Neidinger, CFP
Wealth Strategy Associate
214-981-0549
melissa.kessler@ubs.com

Marc E Haggar
Senior Vice President
Wealth Management
Financial Advisor
214-932-8932
m.haggar@ubs.com

Brandi Moulder-Shearin
Registered Team Associate
214-932-8931
brandi.moulder-shearin@ubs.com

Reach out to us to deepen the conversation.

[advisors.ubs.com/
haggarwealthgroup](https://advisors.ubs.com/haggarwealthgroup)

This case study is shown for informational purposes only and may not be representative of the experience of all clients. It is not intended to represent the performance of any specific investment or financial advisory program. Each client's circumstances may be different. There is no guarantee of the future success of any of the strategies discussed.

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, 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 the client relationship summary provided at ubs.com/relationshipsummary, or ask your UBS Financial Advisor for a copy.

UBS Financial Services Inc. does not provide legal or tax advice and this does not constitute such advice. UBS strongly recommends that persons obtain appropriate independent legal, tax, and other professional advice. © UBS 2026. All rights reserved. The key symbol and UBS are among the registered and unregistered trademarks of UBS. UBS Financial Services Inc. is a subsidiary of UBS Group AG. Member FINRA/SIPC. WM-Case study