Confidence to pursue your mission

Put our investment experience and acumen to work for your organization's long-term vision

Pursue your organization's mission supported by a disciplined consulting process backed by the resources and heritage of one of the world's leading wealth managers.

The UBS Institutional Consulting Group offers customized solutions centered on your organization's unique needs.

You can benefit from discretionary and non-discretionary investment advisory services, insightful research and personalized service. Based on a deep understanding of what you want to accomplish, our highly credentialed consultants can provide the advice you need to prudently manage your assets and pursue your organization's long-term investment goals.

Our people

Our Institutional Consultants are among the most highly credentialed in the industry.*
Certified Investment Management Analyst® (CIMA®) and/or Chartered Financial Analyst (CFA)
Annual training requirement

* Endowment and Foundation Consultants (EFCs) are required to satisfy continuing education requirements that may be mandated by the sponsoring organization (i.e., Investments & Wealth Institute, CFA Institute) to maintain the status of their designation.

Who we serve

More than 2,000 clients, across a broad range of organizations:

- Corporations
- Public and private retirement plans
- State and local governments
- Hospitals and healthcare systems
- Colleges and universities
- Insurance companies
- Faith-based organizations
- Native American tribes
- Foundations and endowments
- Taft-Hartley plans
- Associations and other not-for-profit organizations

Why work with us
Right from the start, we focus on learning everything we can about your organization. To support you in your fiduciary role, we define and document our fiduciary role, always with high-touch, responsive service.

Investment policy planning assistance

- Assess current situation
- Risk/reward profile
- Investment policy development and review

Asset allocation modeling

- Asset allocation analysis
- Overall portfolio design
- Active vs. passive management

Investment manager identification

- Investment manager and strategy:
  - Search
  - Identification
  - Implementation
  - Cost analysis

Ongoing consulting and measurement

- In-depth portfolio and manager review and analysis
- Strategic and tactical allocation advice
- Committee education

What you can expect

We bring a personalized approach to your investment needs supported by a deep knowledge of your organization and its unique goals.

Advice and experience
Deep institutional knowledge and expertise adapted to the unique mission and culture of each organization

Tailored solutions
Comprehensive, customized solutions developed with the experience of highly trained consultants

Personalized service
High-touch service from people committed to getting it right for you as part of an ongoing, collaborative relationship

Let's talk
Our highly credentialed consultants can help you pursue your vision. To learn more, e-mail us at **UBSWorkplaceSolutions@ubs.com** or visit **ubs.com/institutionalconsulting** today.

About UBS Workplace Wealth Solutions

UBS Workplace Wealth Solutions collaborates with corporate clients to deliver customized solutions across a range of programs for the workplace, including financial wellness, retirement, equity plans and institutional consulting. We currently provide more than 10,000 employers and their two million employees in over 150 countries with access to financial knowledge, benefits programs that prepare them for retirement, and an integrated experience that combines the right mix of people and technology. We work side-by-side with our clients so that their employees—and they—feel rewarded at work and optimistic about realizing their long-term financial goals.

Important Information

UBS Institutional Consulting is an investment advisory program. Details regarding the program, including fees, services, features and suitability, are provided in the ADV Disclosure, available from your Financial Advisor or accessed at **ubs.com/accountdisclosures.**

UBS does not provide legal, tax or actuarial advice. You will be responsible for ensuring that your investment policy statement and other legal documents comply with legal or other regulations or requirements that apply to you. You should consult with your legal and tax advisors regarding those matters.

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