UBS

Living your legacy

Helping your family flourish for generations

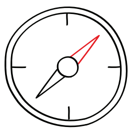
UBS Family Advisory and Philanthropy Services

Our mission is to serve as a thought partner to exceptional families. We understand that your needs extend beyond the purely financial, so we take a strategic and sustainable approach to managing your wealth for continuity and creating a lasting legacy.

We serve as an extension of your UBS Financial Advisor and have vast experience supporting wealth creators, inheritors and multigenerational families, as well as meeting families wherever they are on their philanthropic journey.

Our services

Our Family Advisory and Philanthropy Services provide critical advice, insights and execution for families to flourish for generations.



Family Advisory

Charting the way forward

Philanthropy Services

Maximizing impact locally, nationally and globally

Advice

Our team has extensive knowledge and can provide guidance and best practices to your family on:

- Family wealth education and communication
- Heir preparedness and engagement
- Family qualitative capitals
- Family governance and strategy
- Family mission statements
- Family meeting topics and exercises
- Legacy planning
- Business succession planning

- Philanthropic vision, mission and goals
- Effective governance and grantmaking
- Charitable giving vehicles/strategies
- Rising generation education and engagement
- Philanthropic succession planning
- International giving
- Scholarship funds
- Social finance

Insights

We offer clients various opportunities to connect and expand knowledge on:

- Thought leadership: family-focused content pieces, dedicated podcast series and tools for family connection
- Peer-sharing platform: Young Successors Community
- Signature client programs: family wealth symposiums and multigenerational events

- Thought leadership: SDG-focused white papers, articles on philanthropy trends, plus topical podcasts and webinars
- Peer-sharing platform: Global Philanthropists Community
- Signature client programs: philanthropy forums and issue-specific roundtables

Execution

For clients of exceptional financial success, our team is available to support in the planning and execution of:

- Designing and facilitating family meetings or retreats
- Defining family values and mission statement
- Articulating purpose and legacy
- Establishing a family governance framework
- Developing wealth transfer communication plans
- Preparing rising generations with financial education
- Facilitating intergenerational communication exercises

- Maximizing impact through the UBS Optimus Foundation
- Developing and refining strategic philanthropy plans
- Aligning charitable goals and giving vehicles
- Creating philanthropy mission/vision statements
- Engaging rising generations in family philanthropy
- Establishing governance frameworks
- UBS Collectives

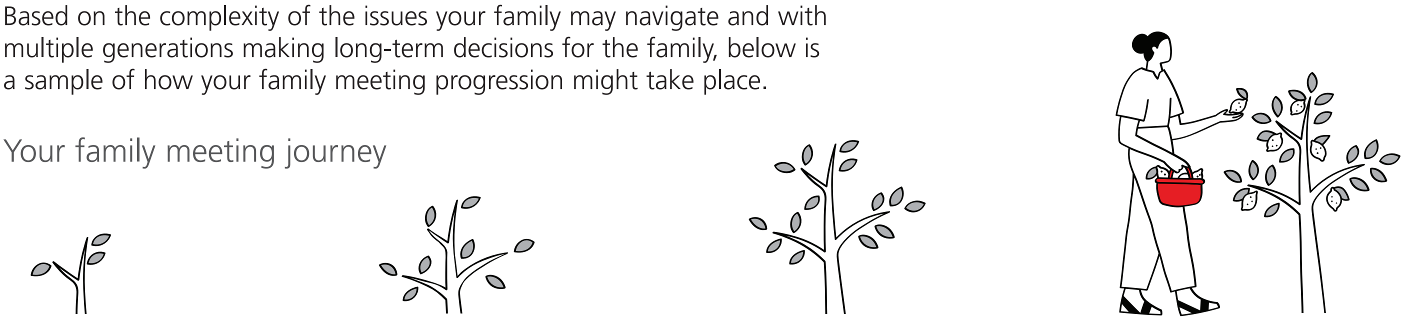
Taking advantage of our offering

Below are a few examples of the range of services available to you and your family.

Family Advisory

Based on the complexity of the issues your family may navigate and with multiple generations making long-term decisions for the family, below is a sample of how your family meeting progression might take place.

Your family meeting journey



First meeting

- Develop and confirm values and vision
- A recount of family history and stories

Second meeting

- Charitable giving
- Communication style assessment
- Financial education

Third meeting

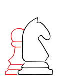
- Long-range planning (i.e., family strategic plan, governance and goal-setting topics to be determined by family priorities)

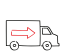
Ongoing

- Topics to be determined by family priorities

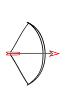
Philanthropy Services

Effective philanthropy takes an investment-based approach, minimizing negative outcomes and maximizing impact at scale. Our 6 "s" framework can help you create more impactful philanthropy.


Strategy What are my broad objectives?


Structure Do I have the right giving vehicle to maximize my impact?


Situation What are the problems or issues I would like to address?


Solution How can I identify solutions that work and are cost-effective?


Sustainability How can I exit from or sustain the solutions I invest in?


Scale Can the solution be scaled to maximize reach and impact?

About the UBS Optimus Foundation

UBS is the only wealth management firm with a client-facing foundation where we co-invest with our clients in philanthropy.

- UBS covers all administration and management costs so that 100% of donations go directly toward programs our team of professionals have sourced and vetted.
- In some cases, we even match contributions by 10% or more, amplifying impact to the causes you care about.
- Over the last 20 years we have supported more than 300 programs in over 75 countries in the areas of health care, education, child protection and the environment.

What legacy will you live and leave?

If there's one thing we've learned over the last 150 years, it's that every family is different. Together with your Financial Advisor, we are dedicated to understanding yours. At UBS, we pride ourselves on putting thought and care into helping you fulfill your mission for today, tomorrow and generations to come.

Please visit ubs.com/privatewealthmanagement to learn more.

The UBS Optimus Foundation is a grant-making foundation that helps UBS clients use their wealth to drive positive social change for children. The foundation selects programs that improve children's health, education and protection, ones that have the potential to be transformative, scalable and sustainable.

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