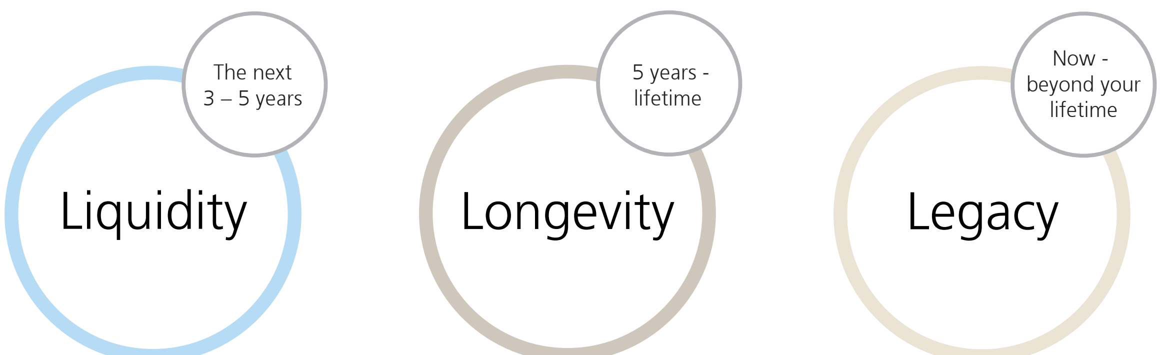
Meeting Agenda

UBS Wealth Way

Objectives

I. The five questions
- What do you want to accomplish in your **life**?
- Who are the **people** that matter most to you?
- What do you want your **legacy** to be?
- What are your main **concerns**?
- How do you **plan** to achieve your life's vision?

II. Liquidity. Longevity. Legacy. (*What, Why, and How*)
Liquidity—to help provide cash flow for short-term expenses, **Longevity**—for longer-term needs and **Legacy**—for needs that go beyond your own.



To help **maintain** your lifestyle
- Entertainment
- Taxes
- Purchasing real estate
- Tuition expenses
- Near-term expenses

To help **improve** your lifestyle
- Additional real estate
- Earnings potential
- Healthcare and long-term care
- Retirement
- College
- Caring for aging parents

To help **improve** the lives of others
- Giving to family
- Philanthropy
- Wealth transfer over generations

III. Market/Economic Update

IV. Portfolio Review

V. Set next meeting date

Borrowing is subject to credit or collateral approval.

UBS Wealth Way is an approach incorporating Liquidity. Longevity. Legacy. strategies that UBS Financial Services Inc. and our Financial Advisors can use to assist clients in exploring and pursuing their wealth management needs and goals over different timeframes. This approach is not a promise or guarantee that wealth, or any financial results, can or will be achieved. All investments involve the risk of loss, including the risk of loss of the entire investment. Timeframes may vary. Strategies are subject to individual client goals, objectives and suitability.

Notes:

Important information about brokerage and advisory services.
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 the client relationship summary provided at **ubs.com/relationshipsummary,** or ask your UBS Financial Advisor for a copy.