

# A passion for art

Guiding inspired and  
sophisticated collections



Art Advisory | Family Office Solutions



Collecting art has been a passion among individuals and families across the globe for centuries. However, the path to building a timeless collection is seldom a clear one. Great collections are recognized as such exactly because so few successfully navigate the pitfalls that inevitably arise.

The benefits of collecting art are manifold and continue for collectors active today. In addition to living with great objects that bring daily enjoyment and curiosity, owning art offers a platform for personal expression, provides a direct tangible connection to the broader creative heritage and frequently grows into a rich source of intellectual engagement.

Over time, an art collection can increase in both financial and cultural value, empowering its owners to create a legacy across generations. And often, individuals move beyond their role as private collectors to become stakeholders in the global art ecosystem, influencing trends, shaping markets, and contributing significantly to public-facing institutions and the cultural commons.

Yet it is no easy task to build a collection that will be personally meaningful, remain relevant over time and have the best chance of long-term value.

UBS Art Advisory, a service of Family Office Solutions, guides individuals and families toward the principles and best practices to build, maintain and plan for exceptional lasting collections. Through a suite of advisory services related to art collecting, art market due diligence, collection management, strategic planning and art legacy, collectors of significant wealth are equipped with the knowledge and support to set the standard for our generation's leading collections.



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## Customized guidance

Collections of consequence will always be distinctive from one another, as each is a reflection of the collector's unique goals and motivations. We bring customized guidance to support collectors across a range of experience levels and types of collections.

### Established top collectors

- Sophisticated, informed support in understanding art world complexities
- Objective advice not motivated by completed art transactions
- Insights from other top collectors and art world participants
- Strategic structuring and forethought
- Advanced, holistic legacy planning for collections

### New and developing collectors

- Assistance in identifying areas of collecting interest
- Education and guidance on entering the art market
- Art portfolio review and alignment with collecting goals
- Due diligence and advisory support during transactions
- Advice on structures and strategies for acquisitions and sales
- Connection to collection management resources

### Family offices and multigenerational collections

- Support for CIOs and family office executives charged with managing family art collections
- Best practices and resources for optimal collection management
- Guidance in establishing collection priorities and vision among family members
- Strategic assessment of inherited or existing collections

### Investing and asset diversification collectors

- Education on benefit and risk factors inherent in art collecting
- Insights into market opportunities and risks
- Post-liquidity collection planning for business owners
- Connectivity to art lending capabilities

### Business owner and corporate collections

- Aligning personal collecting vision and corporate collection goals
- Establishing a framework and resources to manage a corporate collection

### Collections in transition

- Guidance when rotating a collection into new priorities
- Advice on market opportunities and strategies



## Advisory services

UBS Art Advisory partners with clients over the lifecycle of their collections, serving as a specialist at each stage to focus on personal gratification, meaning and impact.



### Developing a collection

- Advice on establishing a vision, strategy and budget
- Bespoke guidance when buying and selling significant artworks
- Education on due diligence to make informed decisions during art market transactions
- Insight into market dynamics and internal workings of art market participants to help expose pitfalls and minimize risks
- Connection to opportunities aligned with each collector's goals

### Caring for a collection

- Advice and best practices for the safekeeping and long-term care of a collection
- Guidance and connectivity to industry-leading third-party providers necessary to manage a collection, including:
  - Appraisal and valuation services
  - Fine art and collectible insurance specialists
  - Shipping, storage and logistics services
  - Collection management systems
  - Art law and structuring professionals

### Planning for the legacy of a collection

- Strategic ideas to create the most impact
- Guidance on structuring philanthropic gifts
- Advice on appropriate sales channels
- Collection distribution advice in the context of family interests and estate planning
- Guidance in defining multigenerational collecting objectives



## UBS Art Advisory in context

The advice and guidance we provide is an integral part of the passion for art that we share with clients.

### UBS Art Collection

With over 30,000 artworks by influential artists of our time, the UBS Art Collection is one of the most significant corporate collections worldwide. UBS has been collecting contemporary art since the 1960s. It is a passion that we share with a large global community of clients. The Collection's guiding mission is to collaborate with and collect work by the most significant artists of our time. These works, displayed in UBS offices globally and in the UBS Art Gallery in New York, inspire thought and conversations about significant issues that affect our world. UBS also actively lends works to major art museums and cultural institutions for public exhibitions.

### Global art sponsorship

UBS maintains an extensive sponsorship portfolio, including art fairs and museums around the world. As the Global Lead Partner of Art Basel, UBS and Art Basel publish the yearly *Art Market Report*, the leading reference study of the economy of the global art market. Our large-scale hospitality and promotional platforms engage clients and audiences in contemporary art discourse.

### Art Basel sponsorship

As Global Lead Partner of Art Basel for over 20 years, UBS has a long history of supporting contemporary art and artists. The firm seeks to advance the international conversation about the

art market through its global lead partnership with Art Basel, and as co-publisher of the Art Basel and UBS Global Art Market Report. Founded by gallerists in 1970, Art Basel is the leading global platform connecting collectors, galleries and artists. Art Basel's fairs in Basel, Hong Kong, Paris and Miami Beach, as well as its Online Viewing Rooms, are a driving force in supporting galleries as they nurture the careers of artists. Art Basel's initiatives strive to create unique artist-led experiences and strengthen local art scenes.

## Professional network

At UBS, we understand the need for services you can feel confident about to support the many dimensions of your life.

The UBS Professional Network is a select group of external providers that have met our criteria for professional service. Our vetted art advisory providers can assist you with the practical needs of maintaining an art collection, including:

**Appraisal/valuation**—Professional resources for determining valuation of fine art and collectibles

**Insurance**—Providers of insurance policies specifically for fine art and other collectibles

**Shipping/storage/logistics**—Specialized services related to the transport, storage, and installation of fine art objects nationwide

**Art law and structuring**—Expert resources related to legal and financial structuring issues surrounding fine art collections

**Registrar services and inventory management**—Services that specialize in creating collection inventories and registering all necessary information to track a collection

**Museum and exhibition strategy**—Strategy development and execution to lend a significant collection or create a private museum

**Other collectibles**—Professional resources related to collectible cars, wine and watches

## Publications and insights



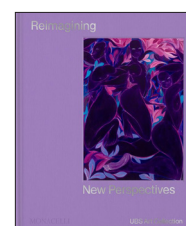
### Art and collecting: building a meaningful legacy

From Family Office Solutions, this publication provides insight and guidance on the overlapping aspects of building a meaningful art collection optimally structured for future value.



### The Art Basel and UBS Global Art Market Report

Each year, this report presents the results of a comprehensive and macro-level analysis of the global art market and collectors' behaviors. To download your copy, visit [ubs.com/collecting](https://ubs.com/collecting).



### Reimagining New Perspectives

The most recent UBS Art Collection book commemorates the evolution of the collection's curatorial direction. It brings together more than 120 works acquired within the past seven years by artists who offer new and diverse perspectives based on their distinct backgrounds and experiences.



# Building a timeless collection

At the heart of most great collections are individuals who have exercised their simple and direct love for art by seeking to be near it, to live with it, to preserve it and to share it with others. Over the course of doing so, they have likely forged a deep knowledge of the works they own, developed a network of like-minded and influential people who have helped them along the way, and accumulated a bank of trusted resources to guide them through the overlapping areas of expertise required.

To guide our clients through the many stages of a collection, the UBS Art Advisory team brings extensive experience directly advising on how to thoughtfully build, manage and activate a timeless art collection. To partner with us for your collecting needs, please contact your UBS Financial Advisor.

## About Family Office Solutions

UBS Art Advisory is part of UBS Family Office Solutions, a team of specialists that exclusively works with USD 100 million+ net worth families and family offices. The team helps clients navigate the challenges and opportunities across their family enterprises, including their businesses, family offices, philanthropic structures, and passions and interests. Having this expertise under one roof allows for integration and layering of services across the UBS ecosystem, delivering a personalized, holistic client experience.

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