



UBS Institutional Consulting

Customized solutions that help address your organization's unique needs

UBS Institutional Consulting provides customized consulting services and solutions for a wide range of institutional clients. We leverage the resources and expertise of our global financial services firm to offer objective advice and creative strategies to address complex situations.



Complexity demands more than customized solutions

With UBS Institutional Consultants** averaging more than two decades of financial services experience, we have encountered many economic environments. We can draw upon this foundation to provide advice that takes into consideration different market cycles and conditions, and is customized to your specific preferences.



Robust resources to support your investment needs

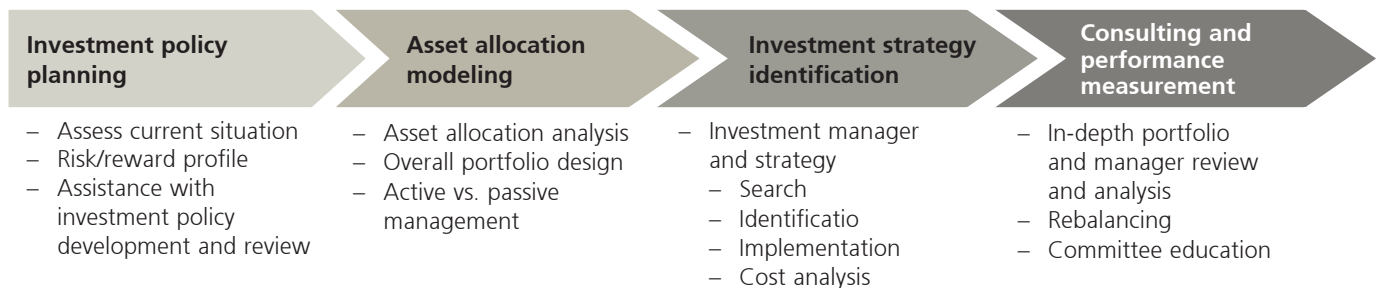
Our expansive intellectual capital enables us to provide you with access to the latest updates and insights into today's economy, and in-depth analysis of capital market trends. Our full suite of sophisticated portfolio evaluation, market research, manager/strategy analysis, and investment and reporting tools delivers transparent information to help guide prudent investment decisions.



Our focus

With each of our clients, we hold ourselves to high standards of service. From the outset of our relationship, we will carefully define and formally document our consulting role including the extent of our fiduciary responsibility with respect to our contracted services. Our services are designed to help support you in your fiduciary role.

Our disciplined and thorough process



UBS Institutional Consulting offers a full range of institutional consulting services within UBS Financial Services Inc. and serves clients with approximately \$187 billion in combined assets under advisement.*

* As of 12/31/2023; Institutional and Retirement Plan Consulting programs.

** UBS Institutional Consultant(s) is defined as a Financial Advisor designated by UBS Financial Services Inc. as an Institutional Consultant or Senior Institutional Consultant.

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.

UBS Institutional Consulting Services are investment advisory services and clients should carefully read the UBS Institutional Consulting ADV Disclosure Document for important information regarding our consulting services, including fees and scope of services, before entering into a Consulting Services Agreement.

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