

# You. Connected.

A curated guide to ultra high net worth solutions,  
experiences, expertise and communities

UBS Ultra High Net Worth  
Solutions Group





# Unlocking opportunity through collaboration

Through specialized centers of excellence, we connect UHNW clients and families to the most relevant expertise through every stage of their financial, professional and personal journeys.



### Advanced Planning

Provides diverse areas of specialization, including estate planning strategies, income and transfer tax planning, family office structuring, business succession planning, charitable planning and family governance.

### Family Advisory & Philanthropy Services

Supports families by enhancing intentional communication for intergenerational wealth transitions and for philanthropy that increases impact locally, nationally and globally.

### Tailored Lending

Offers bespoke strategies for a range of liquidity and capital funding needs, including concentrated and restricted stock loans, unsecured loans, REIT operating units, hedge-fund backed loans and more.

### Portfolio Advisory Group

Focuses on constructing customized investment portfolios to help address client needs through sophisticated quantitative analysis, research-driven asset allocation and tailored portfolio construction advice.

### Family Office Solutions

Provides customized advice with a multigenerational approach exclusively for centimillionaire and billionaire clients who require individualized and holistic solutions.

### Unified Global Banking

Delivers M&A and capital markets advisory and execution to corporates, founders, entrepreneurs, families and ultra high net worth individuals.

### Global Family and Institutional Wealth

Offers access to UBS Investment Bank, institutional coverage and integrated solutions in global markets, global banking, prime brokerage and lending for institutional family offices.



#### Individuals and Families

- Advanced Planning
- Family Advisory and Philanthropy
- Tailored Lending
- Portfolio Advisory Group



#### "Insti-viduals"

- Family Office Solutions
- Unified Global Banking



#### Institutions

- Global Family and Institutional Wealth

# Beyond the financial: Global communities

At UBS, you are connected to global communities of UHNW individuals with similar interests and passions. Members have opportunities to share insights and experiences, to learn from others who are driving impact in the world and to connect on bold ideas and goals.

## Industry Leader Network

For leaders of private companies to stay on top of fast-moving business trends and opportunities across the globe.

## Global Philanthropist Community

For sophisticated philanthropists to shape the future they want to see.

## Collectors Circle

For collectors passionate about art and other passion assets (e.g., cars, watches and wines).

## Young Investors Organization

An exclusive partnership with a premier community of NextGen entrepreneurs, leaders, and change makers around the world.

## Growth Entrepreneurs Network

For exceptional growth entrepreneurs to connect, receive mentorship and gain access to business insights and reports.





# Beyond the financial: Experiences

UBS Signature Events offer exclusive opportunities to connect with other UHNW clients and UBS thought leaders.



## Philanthropy Forum

A two-day global conference connecting UHNW clients with philanthropists, social entrepreneurs and public leaders to engage in discussions related to channeling passion, driving impact and delivering breakthrough solutions to pressing social and environmental issues.

## Global Family Office Summit

An exclusive two-day event designed to gather family offices from across the country in an intimate, collaborative setting to discuss timely, highly relevant opportunities and challenges.

## Emerging Successors Program

This program focuses on helping future inheritors explore their individual purpose and gain a better understanding of their roles in the wealth context of their families. UBS experts and guest speakers guide participants through interactive sessions and discussions.

## Art Basel

One of the world's premier art shows with venues in Basel, Miami Beach and Hong Kong, Art Basel is attended by many of the world's top collectors. As the main sponsor of Art Basel in Miami Beach, UBS provides exclusive access to select clients.



# Curated professional services

We recognize that multiple facets of your life provide opportunities to engage with external experts to actively address the sophisticated needs of your family and your business.





## UBS Professional Network

### Family office offerings

Services that can further elevate our in-house family office design and governance capabilities offering services to better assist with family office design, staffing, compensation and administration.

### Family advisory and philanthropy services

Family advisory services to help families thoughtfully approach discussions around the family business, succession planning, family wealth and creating a family legacy. Philanthropy services to help individuals, families and foundations achieve a significant impact by developing a philanthropic strategy; assisting with nonprofit due diligence and selection; providing good governance practices; establishing nonprofit performance metrics; and conducting impact assessments.

### Lifestyle, passions, concierge and commercial real estate

To aid with all lifestyle needs and passions ranging from travel and healthcare to concierge services including but not limited to art, events, commercial real estate, luxury items and more.

### Bill Pay, technology and administration

Services include a holistic approach to portfolio accounting expense management, tax preparation and system integrations; assistance with recordkeeping, cash flow planning, tax planning coordination, storing and sharing sensitive documents. Advice and services for physical protection, cybersecurity, reputation and risk management.

## UBS Boutique Investment Bank Network

A network of experienced boutique investment banks that:

- Focus primarily on middle-market M&A and capital-raising services
- Specialize in various industries and sectors
- Have local presence and a global reach

We understand that most private business owners and senior executives have a personal connection with their companies that must be accounted for when measuring the true value of their business. By leveraging our network of strategic boutique investment bank partners, UBS can help you find solutions at various stages in your company's growth cycle.





# Questions about the UHNW Solutions Group?

Please reach out to your UBS Financial Advisor or for more information, please visit [ubs.com/uhnwamericas](https://ubs.com/uhnwamericas).

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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