

# A single touchpoint for all your financial needs. Custom solutions and services to pursue your most important goals.



## Investment management

- Tax-efficient portfolios
- Asset allocation
- Alternative investments
- Private equity



## Liquidity event management

- Business sale and transition
- Concentrated and restricted stock management
- Qualified small business stock optimization
- Early exercise options strategies



## Estate planning strategies

- Wealth transfer strategies
- Estate tax strategies
- Insurance planning



## Family advisory services

- Rising gen financial education
- Family philanthropy and impact
- Multigenerational family meetings



## Banking cash management services

- Solutions and strategies
- Concentrated and single-stock backed loans
- Hedge fund backed loans
- Unsecured loans
- Up REIT Operating Units loans
- Other loads



## Strategic philanthropy

- Sustainable investing
- Philanthropic gifting
- Family and private foundations
- Donor-advised funds
- UBS Global Philanthropists Community

Some of these services are provided by third-party vendors.



## Financial Goal Analysis (FGA) at UBS

Our written financial plan that uses sophisticated analytics to help you evaluate whether you are on path toward achieving your personal financial goals.

Our wealth management process:

- Discover
- Create
- Agree and understand
- Implement
- Review

## **The Wagner Abrams Group**

### **UBS Financial Services Inc.**

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We provide periodic monitoring of advisory accounts in accordance with the client's agreements with UBS. Unless separately agreed in writing, UBS does not manage client's brokerage account, and clients make the ultimate decision regarding the purchase or sale of investments.



## Industry-leading research

- Our Chief Investment Office (CIO) strives
- to bring institutional quality research to
- our wealth management clients
- CIO identifies and communicates investment opportunities, industry-leading portfolio analysis, as well as market risks
- Every day their insights help our Financial Advisors help you preserve and grow your wealth

# Important disclosures

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# Important disclosures

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