Zeeb Forsberg Partners

Multigenerational family planning



UBS



Plan now to prepare for tomorrow

As you think about all that you have accomplished, you may be facing new questions about your financial situation. As your family has grown and reached new stages of life, the complexities of your wealth may have increased.

Zeeb Forsberg Partners can help you find the answers you need and bring greater clarity to your financial life. We are family financial advisors who work with each generation to address their specific goals and concerns, including:

- **Grandparents:** Wealth transfer planning, long-term care insurance, designing your legacy
- **Parents:** Retirement income planning, risk management, charitable giving
- **Children:** Education funding, establishing IRAs

In addition to managing your investments and other assets, we offer solutions for the liability side of your personal balance sheet. We can enhance your financial plan with credit and lending services from UBS.

"We work hard to understand our clients, from their concerns about the future to the hopes and dreams they have for their children."

– Craig Zeeb

Building a framework for your financial life

Understanding your life, your wealth and what you want to accomplish is important to how we work together at UBS. We start with questions and a discussion that helps us focus on what's really important to you.

- 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?

Your answers can help inform your financial goals and the plan we create. Together we can organize your financial life into three key strategies.

Liquidity to help provide cash flow for short-term expenses
Longevity for longer-term needs
Legacy for needs that go beyond your own

Then, we can help you identify diverse solutions to pursue your goals across your financial life. It's what we call: Advice. Beyond investing.

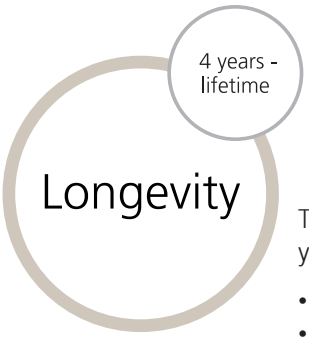
Start the conversation
It's not just about wealth. It's about what your wealth can accomplish: Spending more time with family, realizing your values or pursuing your passions. Your UBS Financial Advisor can help ensure all the moving pieces of your financial life are working together to help you live the life you want.

3 key strategies supported by a wide range of solutions



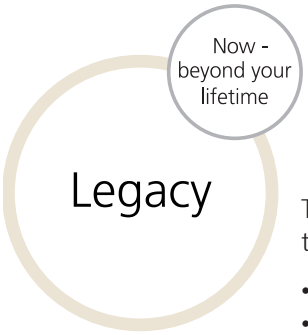
To help **maintain** your lifestyle

- Entertainment and travel
- Taxes
- Purchasing a home



To help **improve** your lifestyle

- Retirement
- Healthcare and long-term care expenses
- Purchasing a second home



To help **improve** the lives of others

- Giving to family
- Philanthropy
- Wealth transfer over generations

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.



Make your cash work harder for you

Whether you need banking solutions, mortgage financing, credit cards or securities-based lines of credit, UBS offers attractive rates, terms and features. You can count on enhanced security and control, and you can call Zeeb Forsberg Partners to help with credit and lending solutions.

Experience to address all your financial needs

We have been working together for many years and have developed a team approach that seeks to serve our clients well. While each team member has a specific role, when we collaborate on our clients' needs, we are able to accomplish much more than any one of us can individually. In addition, our experience and skill sets enable us to offer comprehensive planning.

Our team



Craig S. Zeeb
Financial Advisor
Senior Vice President–Wealth Management
Senior Portfolio Manager
952-921-7946
craig.s.zeeb@ubs.com



Christopher D. Forsberg, CFP®
Financial Advisor
952-921-7940
chris.forsberg@ubs.com



Rebecca A. Janisch
Financial Advisor
952-848-8048
rebecca.janisch@ubs.com



Parker Weber
Registered Client Associate
651-298-8020
parker.weber@ubs.com



Julie Mize
Registered Client Associate
952-921-7945
julie.mize@ubs.com

Zeeb Forsberg Partners
UBS Financial Services Inc.
8500 Normandale Lake Boulevard
Suite 210
Bloomington, MN 55437
952-921-7946
952-921-7900

advisors.ubs.com/zeebforsbergpartners

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