Why UBS?

When it comes to the future you envison, the right conversation can change everything.

Some conversations do more than exchange ideas. They uncover possibilities, clarify priorities and inspire action. That's why UBS Financial Advisors take the time to understand what drives your ambitions, shapes your values and defines the legacy you want to leave. Here's what you can expect from your relationship.



Build relationships across generations

- Work with an Advisor on the goals that matter most
- Receive ongoing guidance through life's milestones and transitions



Gain confidence from seasoned expertise

- Benefit from our Advisors' deep industry experience
- Navigate changing markets and uncertainty with confidence



Understand your full financial picture

- Connect your life and goals with UBS Wealth Way,* our financial planning approach
- Gain clarity on where you stand today
- Build a plan for what's next



More than 160 years focused on clients

- Access Advisor guidance shaped by 160 years of wealth management
- Draw on our heritage of helping clients pursue their goals



Many solutions for your needs

- Find solutions designed around your unique challenges and priorities
- Leverage the breadth and resources of a firm overseeing $4.9 trillion in wealth management assets[1]



Find opportunity in every market

- Benefit from insights informed by UBS Chief Investment Office
- Position your portfolio for emerging trends and opportunities



Put innovation to work for you

- Access UBS tools, insights and capabilities designed to help you stay ahead as your needs evolve



Support the future you're planning

- Make informed estate planning decisions
- Help protect your family's long-term goals and legacy
- Make a meaningful impact through charitable giving strategies



Shape your legacy with our legacy of perspective

- Diverse perspectives and deep expertise
- More than 105,000 employees across 51 countries[2]
- 250+ US branch offices[3]



Build on our strong foundation as you build your own[4]

- Rely on the strength of one of the world's best-capitalized banks
- UBS has solid ratings from Moody's, S&P and Fitch, a conservative risk and funding profile and a high-quality, well-collateralized credit portfolio.

Every important journey begins with a conversation.

A UBS Financial Advisor can help you plan for today, tomorrow and beyond. Learn more at **ubs.com/wm**.

*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 time frames. 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.

[1] As of 2Q26. *UBS Group 30 June 2026 Interim Report*.
[2] *UBS AG Annual Report*. For the year ended December 31, 2025.
[3] UBS, December 2025.
[4] ubs.com.

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Review Code: 6060570. Expiration: 10/28/2027. 2026-2517550