



Trust Structuring for Founders

Strategies on how to best navigate your liquidity event through volatile markets.

Hosted by: Presidio Partners

Warren Coughlin, CFP® Senior Vice President

Speaker: Casey Verst, Senior Wealth Strategist, Advanced Planning Group at UBS

Wednesday, February 21st from 11am-11:45am PT

RSVP to receive calendar invite

RSVP by Wednesday February 21st

Sam Bloom

310-734-0821

samantha.bloom@ubs.com



UBS Financial Services Inc., its affiliates and its employees are not in the business of providing tax or legal advice. Clients should seek advice based upon their particular circumstances from an independent tax advisor.

Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with plaque design) logo in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.

This presentation is for informational and educational purposes only and should not be relied upon as investment advice or the basis for making any investment decisions. The views and opinions expressed may not be those of UBS Financial Services Inc. UBS Financial Services Inc. does not verify and does not guarantee the accuracy or completeness of the information presented. 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 2023. All rights reserved. UBS Financial Services Inc. is a subsidiary of UBS AG. Member FINRA/SIPC. Approval date: 9/1/2023 Expiration: 9/30/2024 Review Code: IS2305291

