

# Planning with impact

## Wealth Management Partners

### Private Wealth Management

#### Establishing a legacy of family philanthropy

By helping a family clarify their “why,” we helped them make their giving more strategic and meaningful for a bigger impact on the world.

#### The situation

There comes a time when many of our clients reassess their needs and goals and how best to use their talents to serve others. This was the case with one of our clients as they approached retirement and began to seriously consider their next stage in life. While they supported many charities throughout their lives, they felt the time was right to consider their philanthropic endeavors with renewed focus and energy. They also wanted to actively involve their family, including their children and grandchildren, in the decision making to create a legacy of giving and make a deeper impact on the world.

#### The strategy

**Tapping into the experts.** To help our client, we brought to bear our extensive personal experience, professional network and global resources of UBS. It’s a trifecta that has gained us valuable knowledge in the philanthropic world. UBS has long been at the forefront of philanthropy and sustainable investing. This expertise helped us form networks of local, national and international philanthropy resources which gave our clients immediate access to these organizations to crystallize their own ideas. This was further augmented by the strength of UBS which offered knowledge, research and investments from across the globe to manifest their ideas.



#### Putting a plan into action.

- From a planning perspective, we used the UBS Wealth Way approach to determine the appropriate amount dollars to allocate to a philanthropic portfolio as part of the client’s legacy strategy. The UBS Wealth Way organizes the clients’ financial life into three key strategies: **Liquidity**—to help provide cash flow for short-term expenses, **Longevity**—for longer-term needs and **Legacy**—for needs beyond their own. We then provided recommendations for the legal structures and how to time their gifts to take advantage of charitable donations that the tax code offers.
- With the help of the UBS Family Advisory & Philanthropy team, we facilitated important conversations the clients needed to have with their family in expressing their vision of giving. The conversations helped the client understand that purposeful philanthropy goes beyond merely writing checks.
- Next we implemented a Sustainable & Impact Investment Strategy, designed to reflect the clients’ values and further their family’s philanthropic mission.
- We also worked with experts to help the client’s grants make the largest impact possible by harnessing our relationship with a local charity to deepen the family’s commitment to the community they live in, as well as children around the globe with the help of UBS Optimus Foundation.

Additionally, in order for the young members of the family to fully embrace the vision of philanthropy, the plan also included a trip for the client’s grandchildren with the UBS Optimus Foundation to begin to form their own ideas of giving.

#### The results

As the clients neared the transition to the next phase of their lives, they were excited about the new opportunities to pursue their vision. The family had a clear philanthropic purpose and a plan that they were proud of. Today, they continue to be thrilled about their commitment to philanthropy and are particularly grateful that their children and grandchildren are committed to the same vision. They remain confident that their charitable giving portfolio is having the impact they hope to see in the world.

**Learn more about how we can help you shape your philanthropy and legacy.**

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.

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