

# UBS Swiss Financial Advisers

## Dedicated to US Persons Seeking International Diversification



**Are you short on time or perhaps you are just too busy – both professionally and personally – to invest and manage your own assets?**

### We can help

Driven by our commitment to offering high quality advice based on your needs and objectives, we have created an open architecture offering. Portfolio solutions are multi-currency, multi-asset and can be customized to meet your specifications.

### Capturing global opportunities

Using a disciplined investment process, our objective is to exploit a range of attractive investment opportunities while controlling associated risks.

### Active coordination is essential

When working out a solution for you, we can coordinate with your third party specialists, as appropriate, to provide an integrated approach to helping you meet your wealth management goals.

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This fact sheet is for your information only and is not intended as an offer, or a solicitation of an offer, to buy or sell any investment instrument or to invest in a specific Portfolio Solution. UBS Swiss Financial Advisers is of necessity unable to take into account the particular tax implications of an investment instrument and therefore recommends that you take specific advice on that from a specialized tax adviser.

### UBS Swiss Financial Advisers is:

- an investment boutique located in Zurich, Switzerland specializing in global asset management for US persons (persons with US tax reporting obligations)
- a wholly owned subsidiary of UBS AG with an independent Board of Directors
- registered as an Investment Adviser in the United States with the Securities and Exchange Commission (SEC) and licensed as a Securities Dealer by the Swiss Financial Market Supervisory Authority (FINMA) in Switzerland.

### Your benefits at a glance

- Geographic segmentation of assets
- Multi-currency, multi-asset capabilities
- Broad international investment range
- Discretionary and Advisory offering specifically designed for US persons
- Zurich based account with Swiss and European Custody
- Libor-based lending using portfolio as collateral
- 1099 tax reporting/customized, detailed tax statement
- Swiss client confidentiality

### Our Investment Programs

#### Managed Programs (Discretionary)\*

- UBS Portfolio Management Global
- UBS Portfolio Management International
- UBS Portfolio Management Asian Opportunities
- UBS Portfolio Management European Opportunities
- UBS Portfolio Management Cash
- UBS Managed Fund Portfolio
- UBS Global Climate Solutions
- UBS Portfolio Strategy International

#### Client-Directed Programs (Non-Discretionary)\*

- UBS Active Portfolio Advisory (Specialist support)
- UBS Investment Advisory (Self directed)

\*Recommended Minimum Investment: 1,000,000 Swiss francs