

# Quick delivery

Digital bank documents via UBS Connect

As a UBS Connect user, you can use the "Digital bank documents" function to retrieve bank documents such as account statements or credit/debit notes in the form of electronic documents. These are available more quickly than by mail and allow you to save on mailing costs. In addition, digital delivery helps to conserve natural resources and enables user-friendly archiving.

## Contract documentation for digital bank documents

If you would like to use the "Digital bank documents" service via UBS Connect, please contact your personal client advisor. We will be happy to send you the necessary contractual documents.

## Access authorization for digital bank documents

Digital bank documents via UBS Connect offers you two different access authorization options:

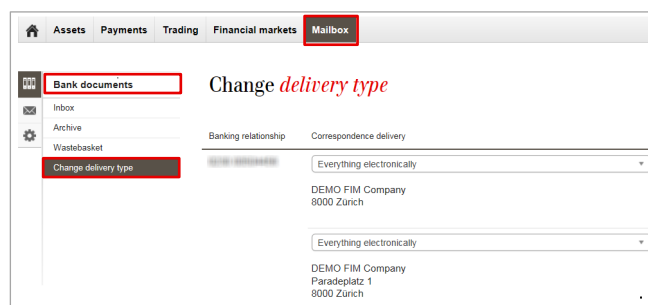
- Persons with **unlimited access** can activate the "Digital bank documents" function via UBS Connect and specify which documents are to be sent in electronic form and which are to be sent in paper form as before. In addition, they are also given access to all documents in the online mailbox of the corresponding banking relationship, irrespective of UBS Connect authorization.
- Persons with **limited access** only receive access to documents in the online mailbox relating to those items for which they are also authorized in UBS Connect.

Access authorization is granted via the document "UBS Digital Banking declaration for the use of UBS Connect", which will be sent to you.

## Activation of digital bank documents

After UBS has received the signed contractual documents, you will be able to activate the digital bank documents service yourself via UBS Connect.

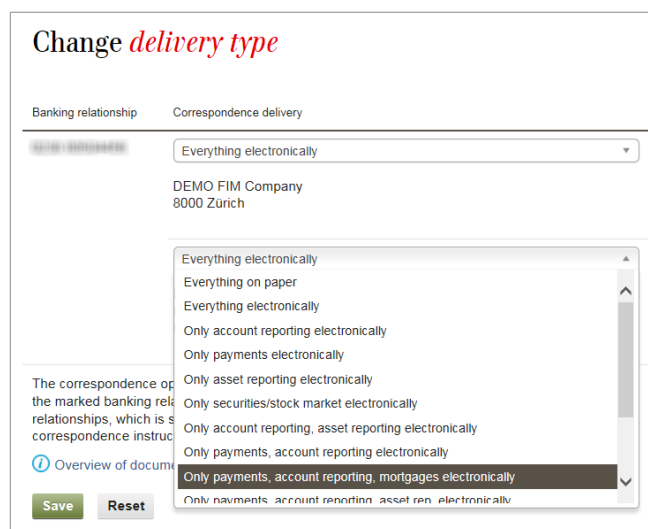
Choose "Change delivery type" in the local navigation menu.



You now have the possibility, for each individual mailing address, to determine which documents are to be changed to e-documents.

A variety of options are available to you: you can choose to switch all documents or just individual document categories.

If, for example, you require the account and asset reports in paper form as usual, but wish to receive all other banking documents electronically, simply select the option "Only payments, securities/stock market, mortgages in electronic form".

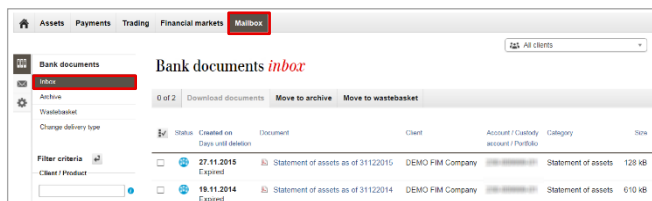


Your selection will be activated as soon as you save the changes. Adjustments can also be carried out in this way. Please note that statutory archiving requirements must be observed for documents held by you.

## Display and management of digital bank documents

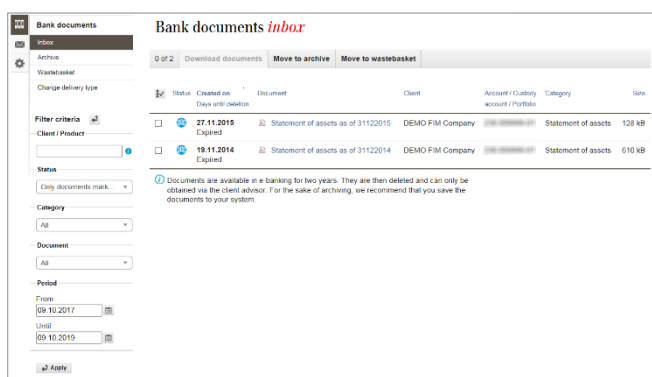
### New documents in the mailbox

You can retrieve the newly received digital bank documents as follows: select "Bank documents" via the menu on the "Mailbox" tab and click on "Inbox".



### Searching and sorting

Digital bank documents in the inbox can be filtered based on the following criteria and sorted or searched for:




#### Client / product

It is also possible to sort according to client name and banking relationship.

#### Status

The following filter criteria are available to you: "Only documents marked as unread", "Only documents marked as read" or "All" documents.

By default, "Only documents marked as unread" are displayed in the inbox after logging in to UBS Connect. You can change this default setting as follows: in the local navigation menu via "Settings" . This ensures the documents are sorted according to your requirements by default after logging in to UBS Connect.

#### Category

The following options are available: payments, securities/stock market, mortgages, account reporting, asset reporting and "All" document categories.

#### Document

Here you can sort the individual document types, such as credit/debit notes.

#### Period

You can specify the period to be displayed under "Period From – Until".


### Saving, printing and moving

You can save the banking documents in your inbox on your PC or print them out. To do this, click on the respective document names. The document is opened in PDF format. A bulk download is also possible (see next section).

The "Move" function allows you to transfer the selected documents from digital bank documents to the "Archive" or "Wastebasket" folders, after which they are no longer displayed in the inbox.

The digital bank documents are available in UBS Connect for a period of ten years.


### Bulk download

Do you want to download all documents in your inbox in one go? Click the  symbol to highlight all documents in the inbox. By clicking on "Download file", all highlighted documents will be made available in a single file (in Zip format).

Tip: Do you want to print out several documents in one step? Highlight the documents you want to print out and save these on your PC. You can now print out the documents using the print function in Adobe Acrobat.

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### For all your questions

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