UBS-SFA Online

User guide
1. Dashboard
   Provides a high level overview by specific portfolio, including value, performance, asset allocation & risk currency allocation

2. Portfolio overview
   - Portfolio list: Review portfolios and sort by type, cash value, time weighted rate of return (“TWRR”) in %, instrument, value
   - Portfolio overview: Review your total wealth, performance Year-to-date ("YTD"), and portfolio values
   - Portfolio performance: Analyze each portfolio performance by various periods. Includes cumulative TWRR and TWRR for each year
   - Portfolio analysis: Explore risk currency weightings, asset class weightings in your preferred reference currency. Review your asset allocation matrix

3. Account overview
   - Account overview: Analyze your liquidity positions. Select further details
   - Bookings: Review the bookings per account and filter by time period, booking text, beneficiary, reason for payment

4. Wealth
   - Wealth overview: Explore your wealth by position level of each asset class by portfolio. Select your preferred reporting currency
   - Wealth positions: Evaluate your positions and analyze your positions by cost price, market profit/loss (“P/L”), currency P/L, value in USD & risk currencies (“CCY”)
   - Wealth transactions: Review transactions by your preferred time periods. Review booking details
   - Maturity analysis: Look over your fixed income positions by maturity date and currency in a yearly or monthly view in matrix form
   - Maturity list: Examine your bond or money market positions by risk CCY, quantity, time period in list form
### My Bank

1. Quick links to most used sub-functionalities
2. News and events
   - Access to exclusive UBS webcasts, news, articles, publications and events
3. Messages
   - Compose, receive messages from your Wealth Management Consultant
     - **Inbox**: Create messages, appointment or call back requests and manage messages
     - **Notifications**: View and manage notifications which you received
     - **Subscriptions**: Subscribe, edit or delete your e-banking or e-mail notifications
4. Documents
   - **Document overview**: Review your portfolio statements, deposit and trade advice in the document safe
   - **Order document**: Order ad-hoc portfolio or account statements delivered straight to your document safe
   - **Document subscriptions**: Order additional portfolio or account statements in your preferred time frame
5. Self-Service
   - Communicate address change to the bank

### Toolbar

1. Information scope
   - Filter the content of My Wealth by portfolio or client. The functionality allows to keep client or portfolio selection through the various functionalities navigation
2. Collaboration
   - Takes you to the inbox of your messages. Compose, receive messages from your Wealth Management Consultant. Request an appointment or a call back directly
3. Documents
   - Redirects you to your document safe
4. Notifications
   - Set up and receive notifications for your portfolios based on your selection
5. Settings
   - Change your password or add alias’ to your portfolios or accounts
6. Logout
   - Safely and securely exit your E-banking

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