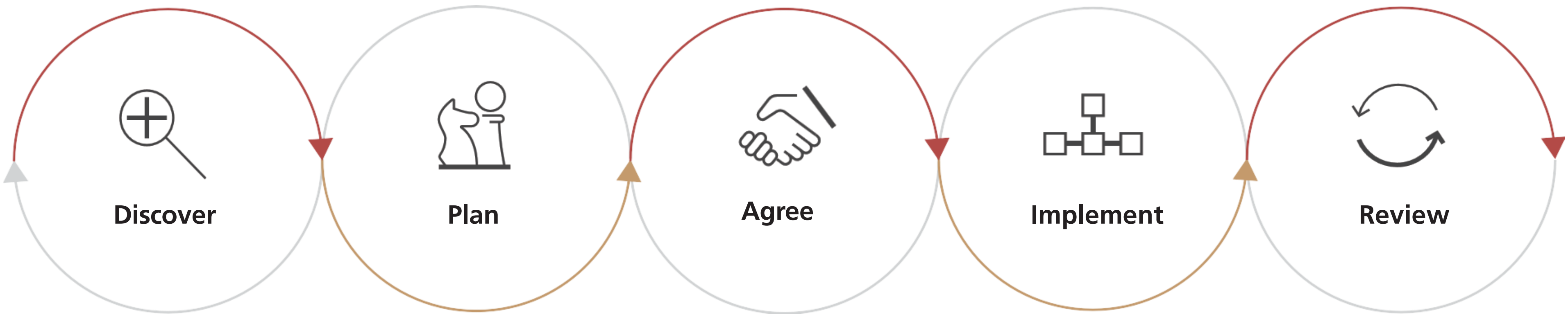
UBS Wealth Way

We work together to help you pursue what matters most



Through deeper conversations, our "discovery" questions will help uncover issues that are important for you and your financial strategy: objectives, projects, concerns, and desires. For today, tomorrow and for future generations.

We organize your assets into 3 strategies:

Liquidity— to help provide cash flows for short term expenses

Longevity— for longer-term needs

Legacy— for needs that go beyond your own

We share a comprehensive range of solutions to help you pursue your goals for every phase of your life.

Once we agree on a plan, we help you to put it in motion.

By working together, we can make any adjustments necessary as your needs, financial circumstances and goals evolve.

Advice. Beyond investing.

- Plan
- Save
- Finance
- Grow
- Protect
- Give

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Knowing you, understanding your financial situation, and establishing what you want to achieve for yourself, for your family, and for your career is essential to our working together. UBS Wealth Way starts with five "discovery" questions to help us identify and focus on what is truly important to you.

What do you want to accomplish in your life?

Who are the people who matter most to you?

What do you want your legacy to be?

What are your main concerns?

How do you plan for achieve your life's vision?

With this knowledge, we organize your financial life into 3 strategies, with different time horizons:

Liquidity: to help provide cash flows to maintain your lifestyle in the short term
Longevity: for a longer-term plan, targeted at improving your lifestyle in the coming years
Legacy: for needs that go beyond your own

Liquidity

The next 3 years

To help maintain your lifestyle

- General expenses
- Buying a home
- Leisure, passions and interests

Longevity

4 years > throughout your life

To help improve your lifestyle

- Retirement
- Healthcare and long-term care expenses
- Additional real estate investments

Legacy

Now and beyond your lifetime

To help improve the lives of others

- Wealth transfer over generations
- Philanthropy
- Donations

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