

# Investment solutions for US taxpayers

Helping you **diversify internationally**

You understand the importance of diversifying your assets. But achieving the right balance of geography, market, asset class and currency is challenging in today's changing markets. As a leading financial adviser for US taxpayers in Switzerland, we provide the expertise and advice you need.

## Your benefits at a glance

- Discretionary mandate offerings designed with US tax reporting obligations in mind
- A multi-currency platform to invest in different currencies and asset classes
- Diversify your assets with regard to investments, jurisdictions and custody
- Long-term investment strategy approach with distinct European view
- 1099 tax reporting and other comprehensive US tax reports

## Why choose us? Because we are:

- Registered with the SEC as an Investment Adviser
- Licensed as a Securities Trader by the Swiss Financial Market Supervisory Authority
- Specialists in global asset management
- An investment boutique located in Zurich, Switzerland
- A wholly owned subsidiary of UBS AG

## Contact us

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Our discretionary and advisory offerings are your path to a wide range of portfolio solutions that vary according to your individual objectives.

## Manage risks while pursuing opportunities

Our transparent investment process helps you exploit investment potential while controlling risks. We regularly review your investment objectives and asset allocation so that they continue to fit your wishes and risk appetite.

## A true open architecture offering

Our multi-currency, multi-asset portfolio solutions are developed specifically for you as a US investor. Utilize a range of UBS and third party solutions to access international markets and currencies.

## Working with others on your behalf

We will gladly coordinate with your other professional advisors when developing your customized investment solutions. Because we share your goal – a genuinely integrated approach that meets the full range of your wealth management needs.

**To find out more** please contact us or visit our website:  
<https://www.ubs.com/ubs-sfa>