



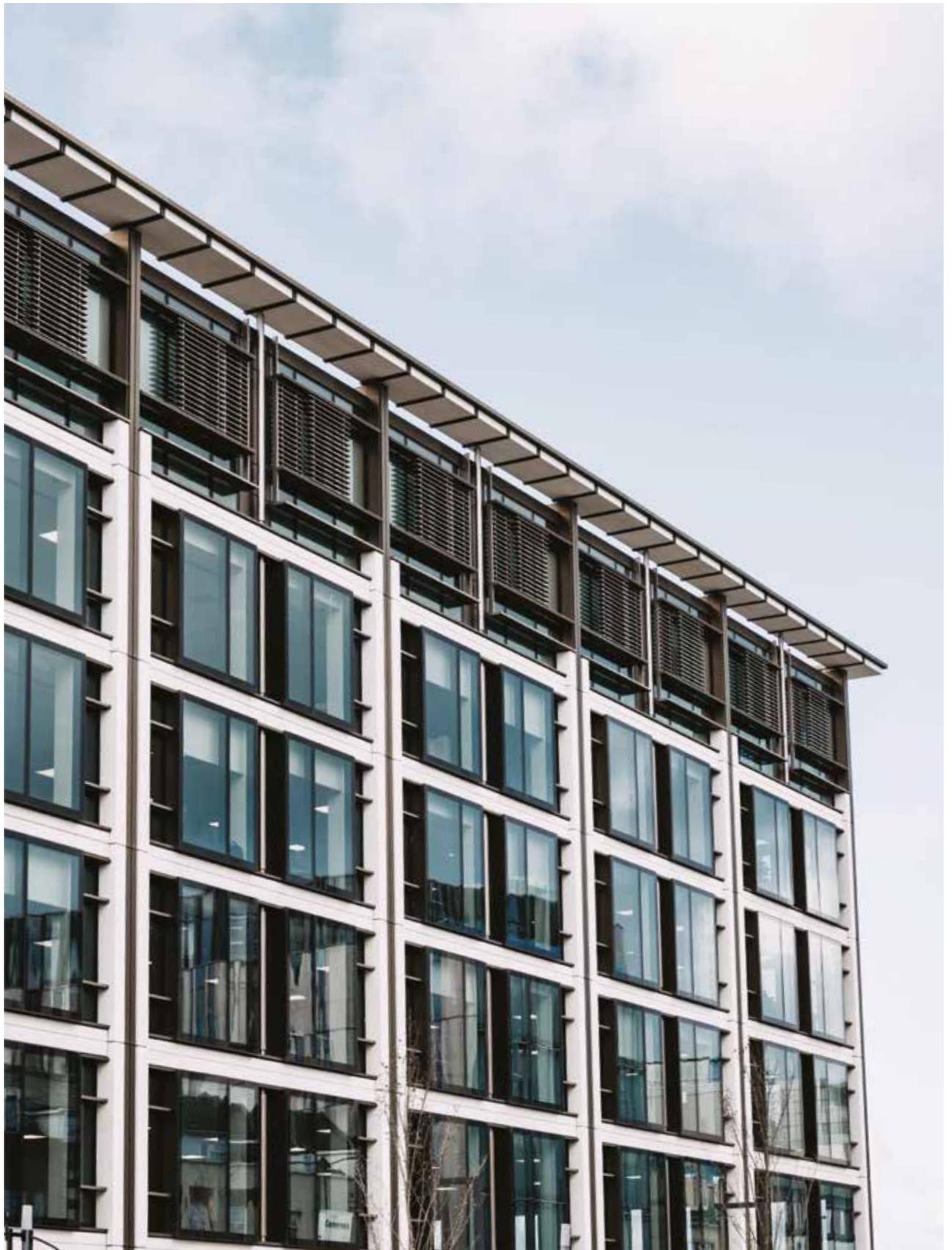
Leading the way

UBS Wealth Management **Jersey**



“Our local expertise,
combined with the global
strength of UBS, provides
clients with an unrivalled
wealth management
experience.”

Michael Clarke
Head of Private Clients



Welcome

from Tom Hill - Group Country Head, Jersey

UBS is the world's premier wealth manager. We do more than simply look after investments and deliver reports; we create and maintain long-term relationships with our clients to help preserve and grow wealth over multiple economic and investment cycles.

UBS is one of the world's largest banks and the only one whose dominant business is wealth management. We are committed to maintaining the highest standards in this field and we are uniquely positioned to navigate fluctuations in financial markets. We offer our clients confidence by delivering originality and knowledge based on experience.

The Private Clients team in Jersey is committed to providing a personalised service that is tailored to each individual client, taking the time to understand what is important to our clients and providing intelligent advice. Our Client Advisors have access to global UBS resources and ensure that every client receives the best possible wealth management advice.

The aim of our wealth management business is to provide you with absolute confidence in your financial decisions.

Tom Hill - Group Country Head, Jersey

Why UBS Jersey?

from Michael Clarke - Head of Private Clients

UBS is recognised as the world's pre-eminent wealth manager. Our local expertise, combined with the global strength of UBS, provides clients with an unrivalled wealth management experience.

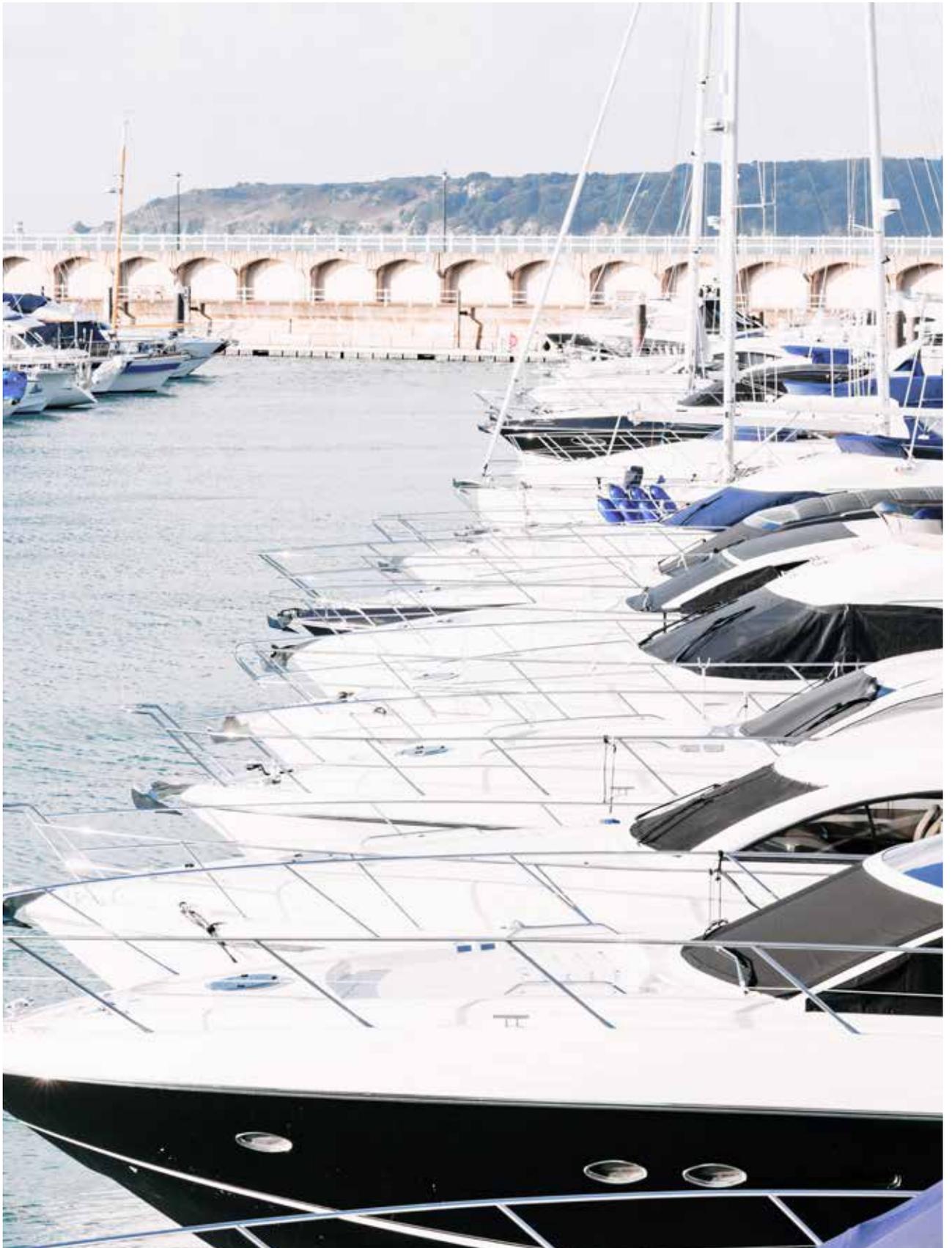
The Private Clients team at UBS Jersey look after the investment requirements of a significant number of Islanders and we are uniquely positioned as the wealth manager of choice in Jersey. Our highly-qualified Client Advisors collectively have more than 100 years' experience in wealth management and have been a key part of the Private Clients team at UBS Jersey for several years. The team is highly skilled at developing bespoke solutions and committed to helping clients achieve way beyond the essential.

UBS offers access to unsurpassed world-class research, a specialist range of tailored advisory and discretionary wealth management solutions in addition to alternative investment capability incorporating private markets and hedge funds. The financial strength of UBS also enables our Client Advisors to provide efficient lending solutions.

Client Advisors at UBS explore every opportunity to provide our clients with direct access to the very best thinking and the most creative investment ideas. We listen and take the time to understand what's important, agreeing solutions that protect and grow our clients' wealth.

Michael Clarke - Head of Private Clients





Services

Discretionary Investment Management
Advisory Investment Services
Wealth Planning

UBS has been established in Jersey since 1979. We understand the needs of those living and working here and we offer a range of wealth management services to Island residents. Whether your priority is to protect, grow or transfer your wealth to the next generation, UBS has a wide range of customised solutions to help you achieve your goals.

“We take the time to understand what is important to you and provide intelligent solutions.”

Tom Hill
Group Country Head, Jersey

Services

Discretionary Investment Management

A UBS investment mandate integrates a wide range of wealth management capabilities into a tailored offering. Our Client Advisors will assist you in defining your investment profile and objectives, enabling our investment specialists and portfolio managers to manage your assets in the most appropriate way to help achieve your goals.

“I work with my clients to agree market-leading investment strategies. This helps my clients to protect and grow their wealth and achieve their goals.”

Marc Nightingale
Senior Client Advisor

“I really appreciate regular meetings with my Client Advisor. I receive frequent performance and strategy updates and have access to portfolio specialists when needed.”

Feedback from a client of UBS Jersey

Advisory Investment Services

UBS Advisory allows you to maintain flexibility and control of investment decisions whilst our Client Advisors and investment specialists support you in managing and monitoring the risks and opportunities, all with your goals in mind. You have access to solutions from UBS and third-party providers as well as our global research capabilities. We will ensure that your portfolio is adapted over time in line with your objectives.

“I offer my clients direct access to the very best of what UBS has to offer - smart thinking and the most creative investment ideas.”

Robert Broughton
Senior Client Advisor

“I appreciate being able to call my personal portfolio specialist directly for professional support, expert advice and fast execution.”

Feedback from a client of UBS Jersey

Services

Wealth Planning

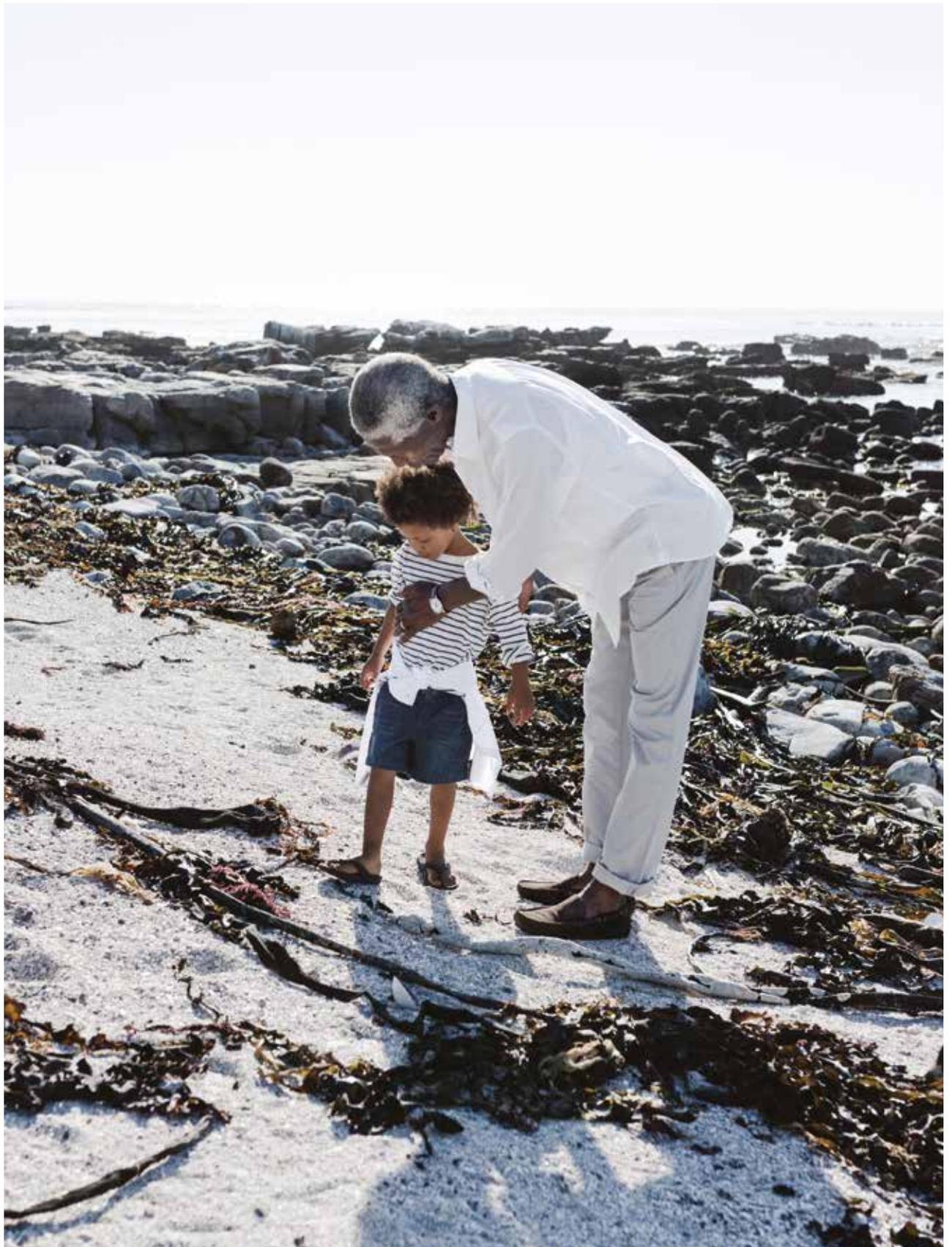
We will support you in understanding how changes in your personal circumstances and objectives might impact your financial plans. Our expertise includes planning for wealth accumulation, retirement and succession. In so doing, we help you to achieve financial security and long-term preservation of your assets.

“The implementation of a considered, strategic financial plan for my clients adds that crucial layer of depth to our advice.”

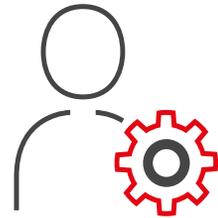
Paul French
Senior Client Advisor

“My Client Advisor has taken the time to really understand the long-term plans for me and my family, which has shed new light on our investment objectives.”

Feedback from a client of UBS Jersey



UBS has been established in Jersey since 1979 and delivers a comprehensive wealth management service to private clients and trustees.



140 employees
in the Jersey team



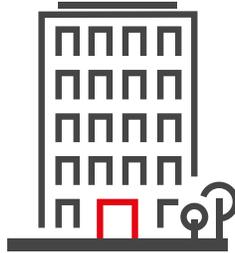
Client Advisors in Jersey collectively have more than 100 years' experience in wealth management



UBS rated "Worlds Best Wealth Manager" by Euromoney 2021 ²



60,000
employees in all major
financial centres



900 offices
in more than 50 countries



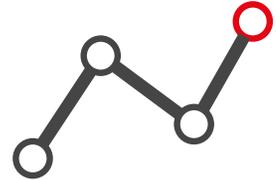
\$2.6 trillion (USD)
invested assets



UBS is the only
truly global
wealth manager



1 in 2
billionaires
put their trust in UBS¹



The world's finest wealth
management research supported
by **900 analysts**,
UBS Investment Bank and
UBS Asset Management



World class
wealth management solutions



Best private
banking services
in 2018, 2019, 2020 and 2021²



¹.Source: UBS Data as of July 2021
².Source: www.euromoney.com





Jersey Team

Tom Hill

Group Country Head, Jersey

Tom's career at UBS spans more than 30 years. Tom has worked in London, Zurich and Tokyo and held several management positions including Global Head of Equity & Economic Research, Chief Communications Officer and Head of Group Strategic Advisory & Investor Relations. Tom is former President of the Jersey Bankers' Association and, in his free time, is a keen sailor, skier and chess player.



Michael Clarke

Head of Private Clients

Michael has 30 years' experience in financial services and has held senior roles with UBS since 2005. During his time in Jersey, Michael has developed an extensive network of high-value local residents and helped create a market-leading wealth management business. Michael is a Chartered Associate of the London Institute of Banking and Finance, sits on the UBS UK & Jersey Investment Sales Committee and is a member of the UBS Jersey Location Board. In his spare time, Michael plays tennis and golf.

“We work as a team, strive for absolute excellence and deliver beyond the essential.”

Michael Clarke

Head of Private Clients

Marc Nightingale

Senior Client Advisor

Marc joined UBS more than 10 years ago and looks after private clients residing in Jersey and the UK along with a small number of international families. Marc is a Chartered Fellow of the Chartered Institute for Securities & Investments and, in his free time, plays golf and football.



Robert Broughton

Senior Client Advisor

Robert joined UBS more than ten years ago and is primarily focused on providing wealth management solutions to private clients in Jersey. Robert is a Chartered Fellow of the Chartered Institute for Securities & Investments and, in his spare time, is a rugby fan and keen golfer.



Jersey Team

Paul French

Senior Client Advisor

Paul has over 25 years' experience in financial services and joined UBS more than ten years ago. Paul specialises in advising Trust Companies and UK Resident Non-Domicile clients. Paul is a member of the Chartered Institute for Securities & Investments and, in his leisure time, plays golf, tennis and squash.



John Pipon

Client Advisor

John joined UBS in 2015 and specialises in providing wealth management solutions to Jersey residents. John holds a First-Class Honours degree in International Financial Services from the University of Buckingham and is a Chartered Fellow of the Chartered Institute for Securities & Investments. In his free time, John enjoys playing a range of sports and has a passion for classic cars.

“Michael Hilge’s specialist investment role has been invaluable in helping my wife and I to construct a suitable investment portfolio and ensuring that the strategy continues to deliver.”

Feedback from a client of UBS Jersey

Joseph Peacock

Client Advisor

Joseph joined UBS in 2017 and provides wealth management solutions to trust companies based in Jersey. Joseph holds a First-Class Honours degree in International Financial Services from the University of Buckingham and is an Associate Member of the Chartered Institute for Securities & Investments. In his spare time, Joseph plays tennis and has completed several marathons.



Stephen Coelho

Client Advisor

Stephen joined UBS in 2017 and provides wealth management solutions to private clients. Stephen holds a Bachelor of Arts in Modern Languages and Cultures from Durham University and is a Member of the Chartered Institute for Securities & Investments. In his free time, Stephen enjoys tennis, golf and cycling.



Jersey Team

Rusne Gecaite-Fielding

Client Account Manager

Rusne helps the Private Clients team to provide wealth management solutions and general banking services. Rusne holds a Bachelor's degree in International Relations & Political Science and studied in Lithuania (Vilnius University), Belgium (Université Libre de Bruxelles) and South Korea (Ajou University). In her spare time, Rusne enjoys tennis, golf, skiing and snowboarding.



Kate Brogan

Client Account Manager

Kate helps the Private Clients team to provide wealth management solutions and general banking services. Kate is an Associate of the Chartered Institute for Securities & Investments and, in her spare time, Kate enjoys family holidays and playing a variety of sports.

Michael Hilge

Chief Investment Specialist

Michael's career spans more than 20 years at UBS in both Zurich and Jersey. As a Client Investment Specialist, Michael advises on the full range of discretionary and advisory investment solutions available in Jersey. Michael is a Certified SIX Swiss Exchange Trader and holds the Certificate in Private Client Investment Advice and Management. Michael sits on the UBS Jersey Location Board and UBS UK & Jersey Investment Management Committee. Michael plays a variety of sports and is a keen gardener.



Pedro Rodrigues

Client Investment Specialist

Pedro joined UBS in 2014 and specialises in advising on the full range of discretionary and advisory investment solutions available in Jersey. Pedro has a Certificate in Private Client Investment Advice and Management. In his spare time, Pedro enjoys golf and spending time with family.





Awards

UBS has been voted the Euromoney 'World's Best Wealth Manager' award for six years in a row.*

UBS was also ranked first in the following global categories:

ESG/Impact Investing

Family Office Services

International Clients

Next Generation

Philanthropic Advice

High Net Worth Clients (GBP 5 million +)

Super Affluent Clients (GBP 1 million to GBP 5 million)

*Source: Euromoney, Private Banking & Wealth Management Survey, February 2021

“We will maintain a long-term relationship with you to help preserve and grow your wealth and safeguard your assets for future generations.”

Tom Hill

Group Country Head, Jersey

For more information about UBS Wealth
Management in Jersey please contact:
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