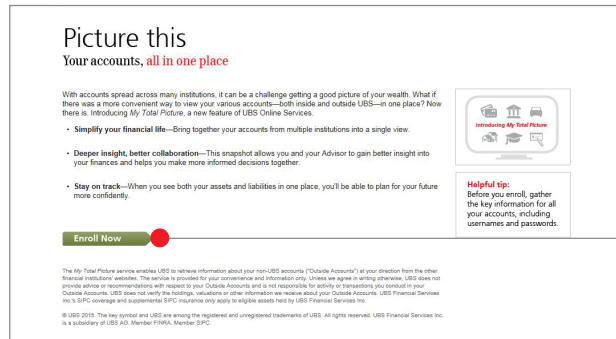


How to get started

Simple steps to getting started with **My Total Picture**

With My Total Picture, a feature of UBS Online Services, you'll be able to view whatever accounts you enroll—both inside and outside UBS—in one convenient place. Below are a few simple steps that can help you get started.

Getting started

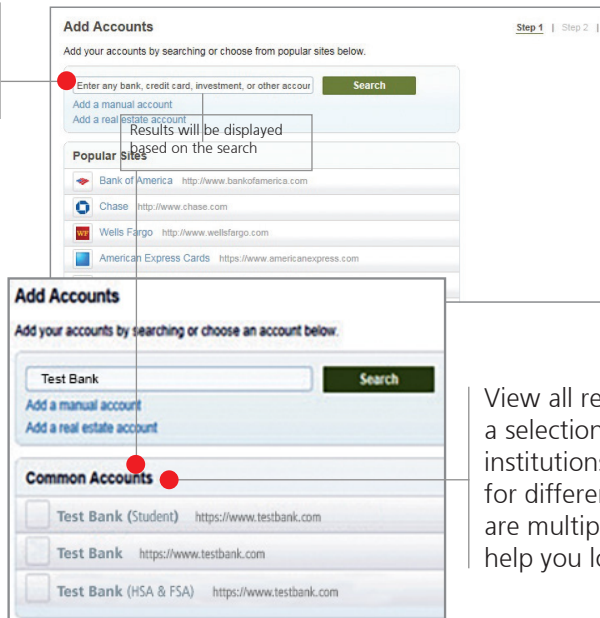


Login to ubs.com/online-services and find the tab called "My Total Picture."

The first time you visit, an informational page will display.

Click the "Enroll Now" button and review the Terms & Conditions before enrolling.

After accepting the Terms & Conditions, you will be prompted to search for your financial institution's name on the "Add Account" screen.



View all results before making a selection since some outside institutions have several different types for different account types. If there are multiple results, the site names will help you locate the correct institution.

Visit ubs.com/accountaggregation for more information.

Enter your credentials. Be sure to check the URL and confirm it's the URL used to login to your outside financial institution.

Add Accounts

* = required field

Test Bank

https://www.testbank.com/
https://secure.testbank.com/login/sign-in/signOnv2screen.go

Please enter the same credentials you use to access your account online.

Test Bank Online ID *

Test Bank Passcode * Show Typing

Re-enter Passcode *

Add

Add Accounts

Account(s) Successfully Added

<input type="checkbox"/>	Test Bank - Credit Card - ...	\$ 0.00	Added ✓ ×
<input type="checkbox"/>	Test Bank - Credit Card - ...	\$ 0.00	Added ✓ ×
<input type="checkbox"/>	Test Bank - Bank - TB Co...	\$ 4,034.52	Added ✓ ×
<input type="checkbox"/>	Test Bank - Bank - Regular...	\$ 7,585.84	Added ✓ ×

✓ We have successfully gathered your account details.

+ Add Accounts View Accounts

Select accounts to add. You can also remove any accounts that you might not want to add.

Once enrolled, navigate the site more easily with this tab.

UBS Wealth Management

Home My UBS Accounts My Wealth Markets Research Insights

My UBS Accounts **My Total Picture** My Plan

Updated 10/4/16 10:20am ET

Assets and Liabilities Summary [Go to My Total Picture](#)

Assets

Liabilities

Header	UBS	Non UBS	Balance
Assets	\$3,240,115.25	\$1,968,001.43	\$5,208,116.68
Investment Assets	\$3,240,115.25	\$468,001.43	\$3,708,116.69
Investment Accounts	\$2,041,115.26		\$2,041,115.26
Retirement Accounts	\$972,034.58	\$468,001.43	\$1,440,036.01
Education Accounts	\$226,808.07		\$226,808.07

Mailbox (3) [View Mailbox](#)

Sample Financial Advisor Team [Contact Info](#)

Trending Topics

Investor Watch
Think you know about the Next Gen investor? Think again.

Healthcare costs spike with age. Here's what to do now.

Note: Once you have entered your accounts and begin using My Total Picture, it is possible you may receive an alert that there is a data refresh error on an account. To avoid potential errors in refreshing information on your accounts, whenever you change login information for an outside account, always update that information in My Total Picture.

Quickly view your total assets and liabilities for both your UBS and non-UBS accounts.

Click here to add outside accounts on My Total Picture.

UBS Wealth Management

Home My UBS Accounts My Wealth Markets Research Insights

My Total Picture **Balances** Holdings Activity

Last updated: 2:57PM ET 11/22/16 [Update Data](#) [Link Outside Accounts](#)

All Accounts My Customized View

Expand All | Collapse All

Account	Data Last Refreshed	Source	Current Balance	Actions
Assets			\$5,068,368.39	
Investment Assets			\$2,081,469.39	
Investment Accounts			\$2,081,469.39	
Investment Account	up-to-date	UBS	\$0.00	***
Investment Account	up-to-date	UBS	\$0.00	***
Bank (xxxxxx53)	a day ago	Non-UBS	\$3,880.44	***
Bank (xxxxxx00)	a day ago	Non-UBS	\$2,321.29	***

Net Balance **\$5,006,070.15**

Assets

Liabilities

See detailed holding and transaction information for each of your accounts, including price, quantity and value.

The screenshot shows the UBS Wealth Management interface. At the top, there's a search bar and navigation links for 'My Profile' and 'Log Out'. Below the navigation, there are tabs for 'My Total Picture', 'Balances', 'Holdings', and 'Activity'. The 'Holdings' tab is active. The account value is displayed as \$29,291,778.60. A red circle highlights the 'Holdings' section header. Below it, there's a table of holdings categorized into Equity and Fixed Income.

Description	Symbol	Last refreshed	Quantity	Total Cost	Value
Equity					
Other					
O'CONNOR GBL MULTISTRAT A...		12/16/16	0.000		\$1,654,274.00
Fixed Income					
CORPORATE NOTES & BONDS					
BANCOLOMBIA SA DTD 9/11/2...		12/16/16	0.000		\$769,561.00
BARCLAY PLC DTD 11/20/2013...		12/16/16	0.000		\$1,388,355.00

See "Activity" for any account tied to My Total Picture.

The screenshot shows the UBS Wealth Management interface with the 'Activity' tab selected. The account is identified as 'Bank of America - Bank (xxx...)'. A red circle highlights the 'Activity' section header. Below it, there's a table of transactions with filters for Date, Symbol, and Activity. The table shows three debit transactions from December 2016.

Date	Activity	Description	Symbol	Quantity	Price/Value	Amount
12/27/16	Debit	KEEP THE CHANGE TRANSFER TO ACCT 3653 FOR 12/27/16			\$0.00	-\$0.64
12/27/16	Debit	PAYPAL DES:INST XFER ID:ADRENALINE INDN:ADAM ESPOSIT...			\$0.00	-\$15.89
12/27/16	Debit	CAPITAL ONE DES:ONLINE PMT ID:xxxxxxxxxxxx8533 INDN:xxxx...			\$0.00	-\$40.00

Helpful tips:

- Before you enroll, gather key information for all your accounts, including usernames and passwords.
- Add all accounts in one sitting or do a few at a time—whatever makes you most comfortable.
- Some institutions will require an authentication process in order to allow the data to be pulled. This is normal. Follow the instructions when this occurs and complete as requested during setup to ensure a smooth experience.
- For a complete picture, remember to add liabilities such as credit cards and mortgages, as well as your assets and property.

The My Total Picture service enables UBS to retrieve information about your non-UBS accounts ("Outside Accounts") at your direction from the other financial institutions' websites. The service is provided for your convenience and information only. Unless we agree in writing otherwise, UBS does not provide advice or recommendations with respect to your Outside Accounts and is not responsible for activity or transactions you conduct in your Outside Accounts. UBS does not verify the holdings, valuations or other information we receive about your Outside Accounts. UBS Financial Services Inc.'s SIPC coverage and supplemental SIPC insurance only apply to eligible assets held by UBS Financial Services Inc.

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