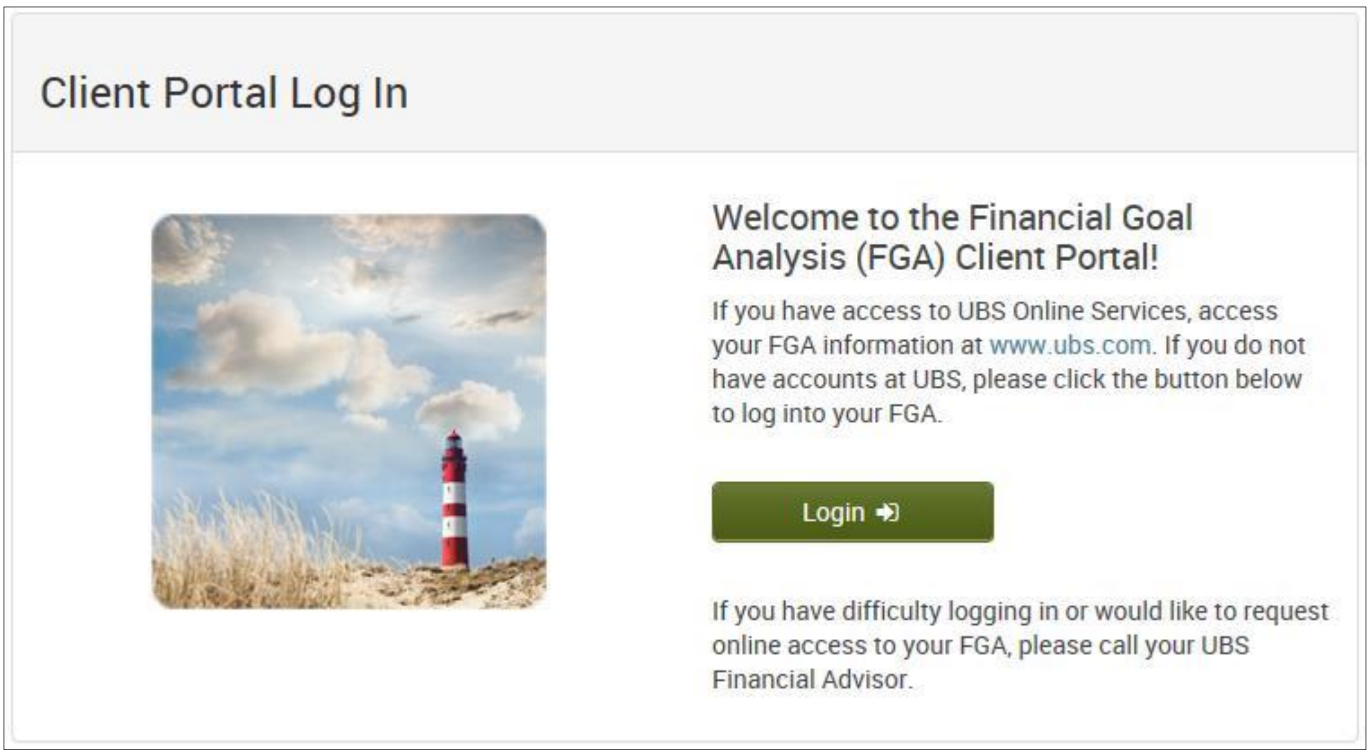
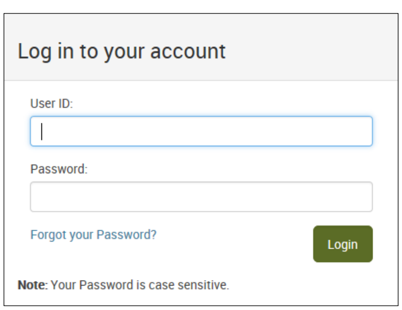
Financial Goal Analysis Portal

Getting started

The Financial Goal Analysis Client Portal feature is a great way to engage in an interactive planning experience.

To begin using the Client Portal, log in using the link below. (Note: this link will direct you to a separate website which is hosted and managed by a third party service provider on behalf of UBS.)
ubs.financialgoalanalysis.com/ubs/Guests.aspx



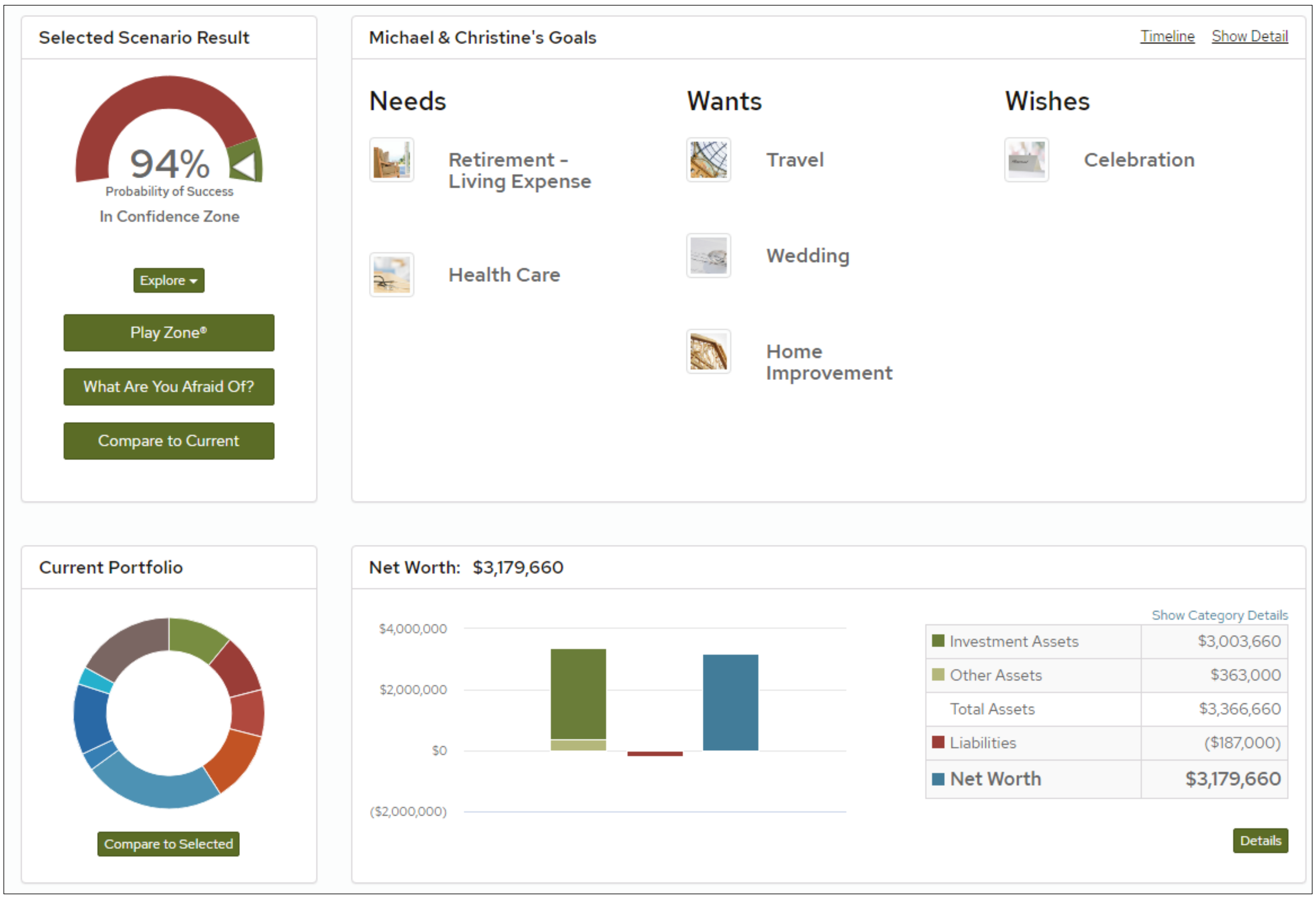


For first-time users only: Enter your user name and temporary password. You will then be prompted to create your own password for future access.

Access to the Financial Goal Analysis Client Portal is in accordance with the Financial Goal Analysis Client Portal Terms of Service, and other applicable agreements, as updated from time-to-time by UBS.

Your Financial Advisor has permissioned you to one of two views:

Snapshot view
The Snapshot screen consolidates high-level plan information in a dashboard. Here you can view your **Selected Scenario Results** (which is the **What If** scenario selected by you), goals, portfolio, net worth and more. You can also drill down for more detail using the green buttons.



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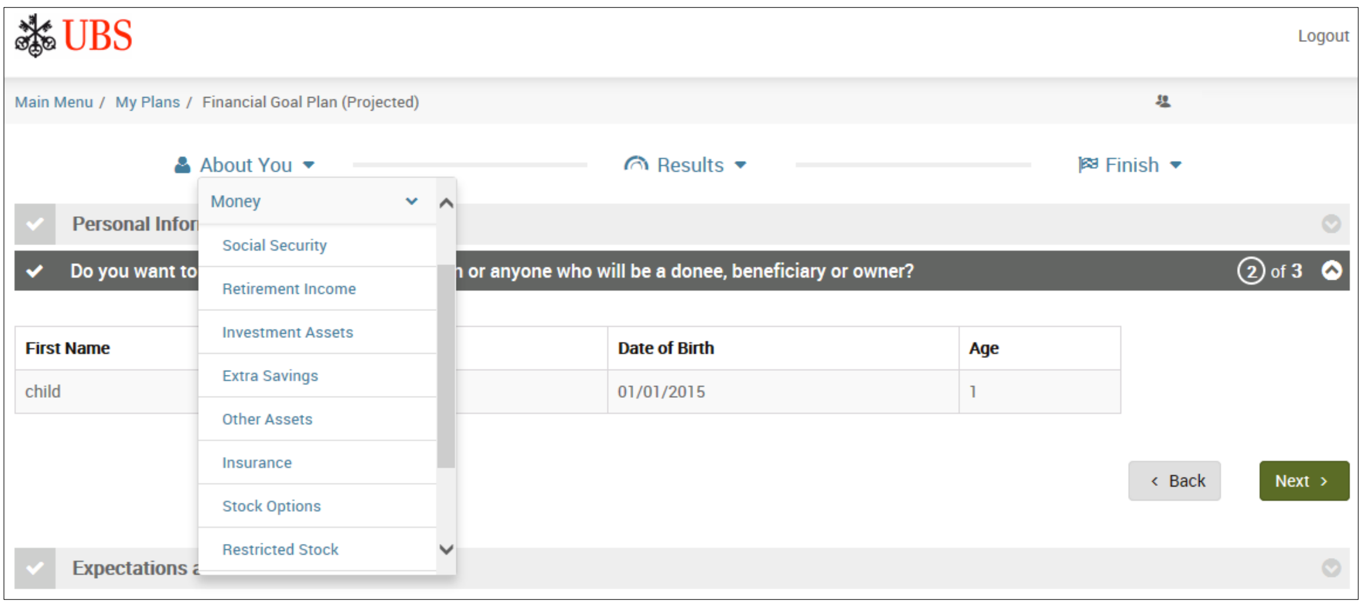
For illustrative purposes only. Results vary for every client, with each use and over time. **Important:** The projections or other information generated by the FGA regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results and are not guarantees of future results. The FGA results are based on various assumptions including financial information, personal preferences and other information provided by the client. The assumptions upon which the plan is based are included in the Plan Details. Important information regarding the methodology, assumptions and limitations of the analysis are included in the *Understanding Your Results* document.

A client's UBS account statements are the only official record of holdings at UBS and are not replaced, amended or superseded by any of the information presented in the FGA or FGA Client Portal.

Full Plan
In Full Plan mode, the navigation bar is located at the top of the screen.

About You contains a drop-down menu of the information you provided. The **Results** contain screens to help you take a deep dive into understanding your goal funding and possible changes that can be made to improve the “Probability of Success“ of your plan. To navigate from screen to screen, you can use the **Next** button on the bottom right or select a screen in the drop down along the top of the screen. Alternatively, you can select the gray navigation bars to move within your current section of the plan.

Note: the first time you access the plan you will need to first review all of the screens in the About You section of the plan—this can be done by using the Next button.



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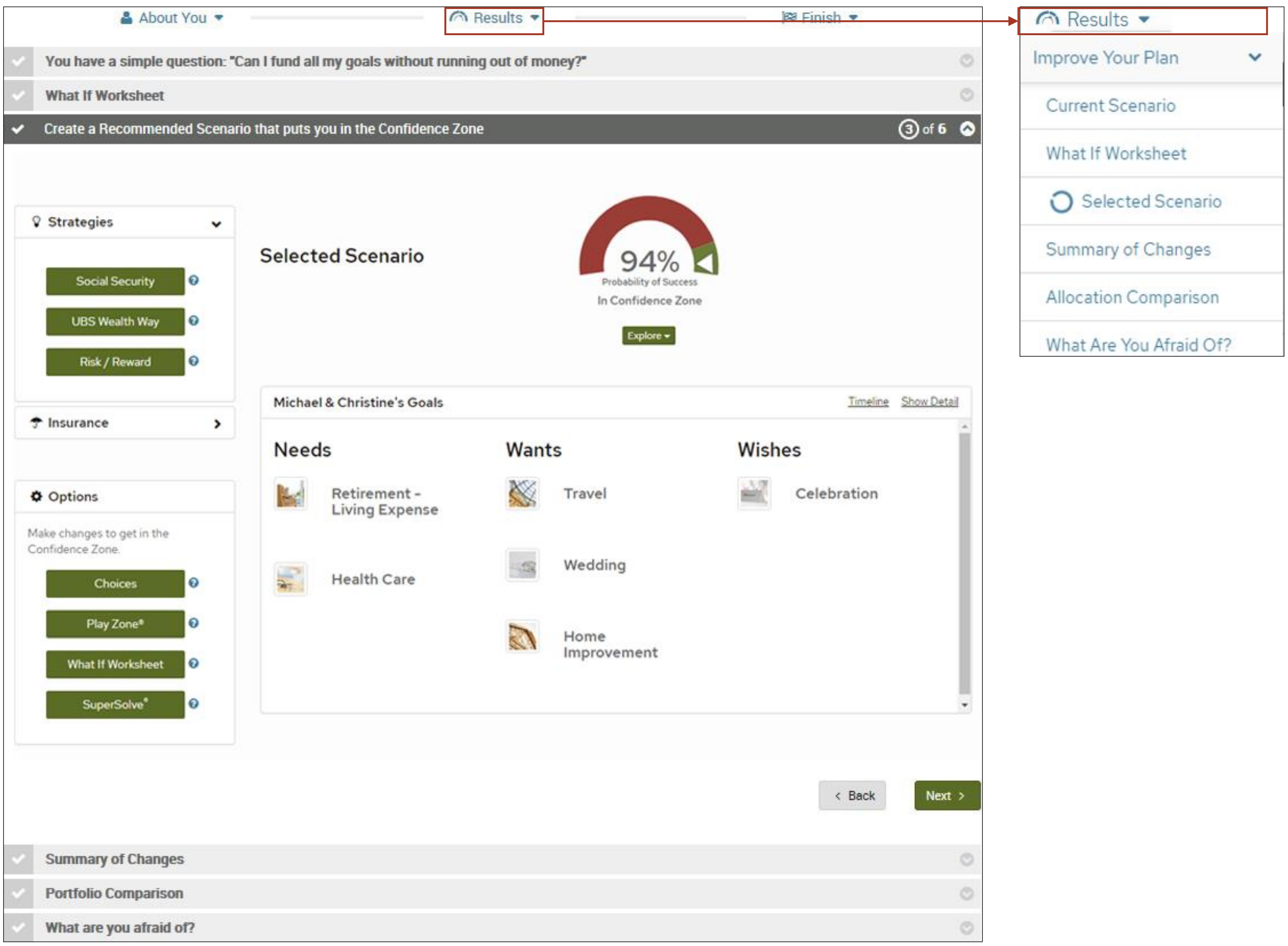
In the **Results** tab, click on **Selected Scenario** to access your **Selected Summary results.** You can drill down for more detail using the green buttons.

Click **Explore** for additional detailed information including, but not limited to, portfolio comparisons, year-by-year detail, additional Stress Tests and a Social Security Analysis chart.



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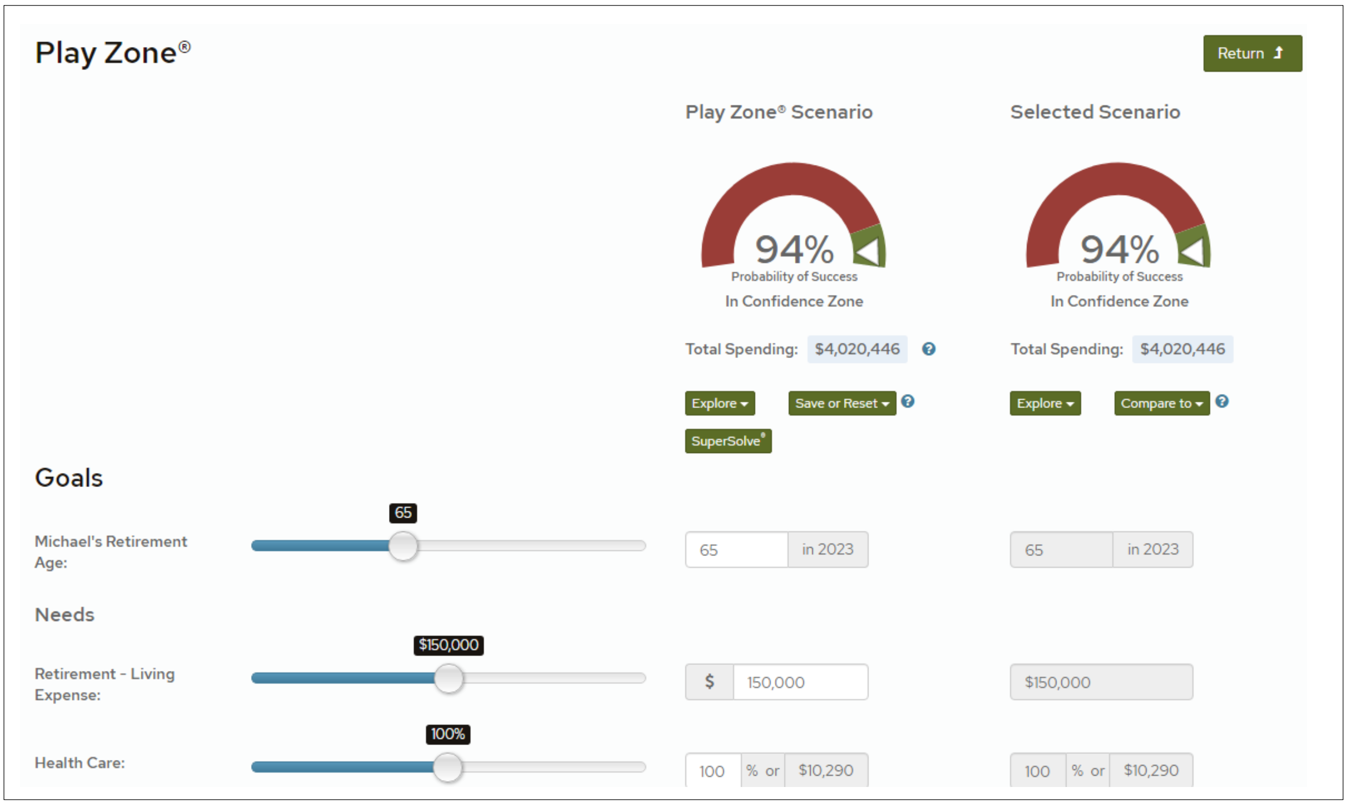
For both the Full Plan and Snapshot views, you will have access to two interactive features.
In the **Play Zone®** feature, use the sliders to adjust your Goals or other assumptions and view the impact on the "Probability of Success." You can save these changes as your Favorite to discuss later with your UBS Financial Advisor.



The **Play Zone®** is a calculator provided to you for illustrative purposes. The information you enter will be used only in the calculator and will not become part of the plan or be used to update the plan results. If you would like to update your financial plan, please contact your Financial Advisor.

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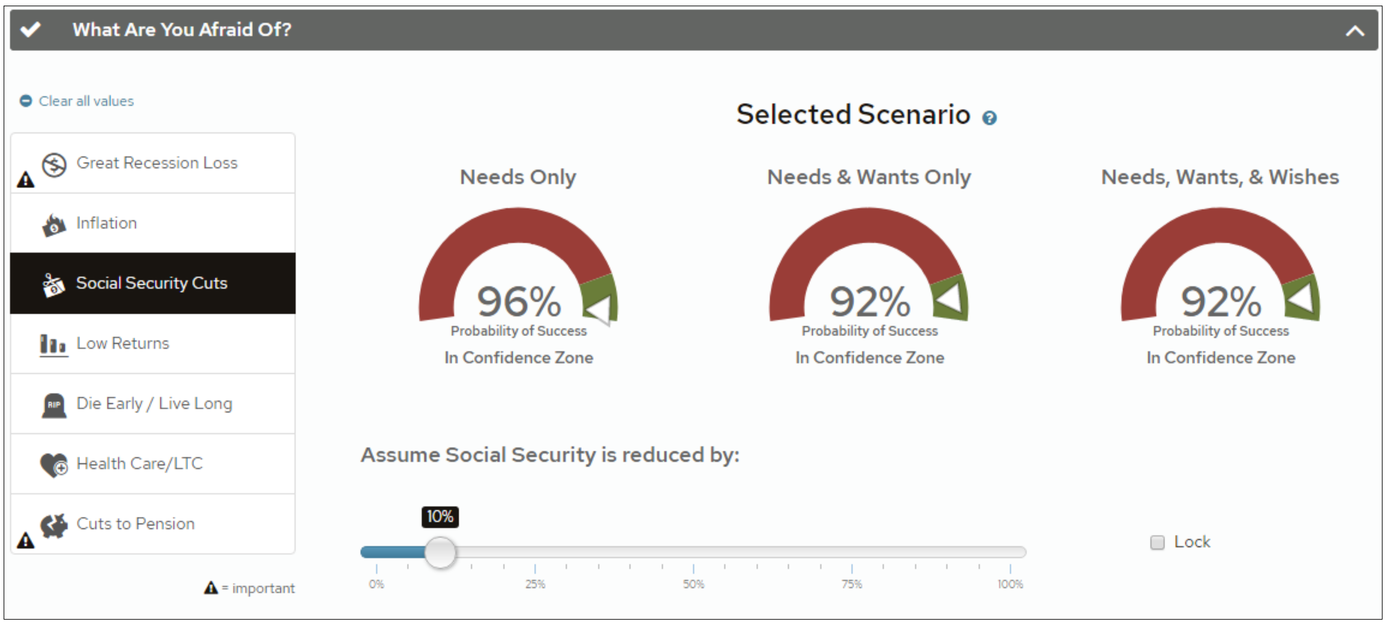
In the **What are you afraid of?** feature, use the sliders to see how a change in one or more specific variables such as inflation, social security cuts, etc. affects your plan. Check the **Lock** checkbox to combine your concerns. Once you lock an item, a padlock icon will display next to the event. To reset the **What are you afraid of?** variables, click the **Clear All Values** link. Once you leave the **What are you afraid of?** screen, all values (including those that are locked) will be cleared.



What are you afraid of? is a calculator provided to you for illustrative purposes. The information you enter will be used only in the calculator and will not become part of the plan or be used to update the plan results. If you would like to update your financial plan, please contact your Financial Advisor.

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Please remember to log out before you leave the FGA Client Portal.

Accessing the Client Portal
For quick and easy access in the future, save the Client Portal login page as a "Favorite" or "Bookmark" in your web browser.

For additional information, contact your UBS Financial Advisor.

FA name
Title
Phone
E-mail

Address 1
Address 2
Address 3
FA website

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