

# 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](https://ubs.financialgoalanalysis.com/ubs/Guests.aspx)

### Client Portal Log In



**Welcome to the Financial Goal Analysis (FGA) Client Portal!**

If you have access to UBS Online Services, access your FGA information at [www.ubs.com](http://www.ubs.com). If you do not have accounts at UBS, please click the button below to log into your FGA.

[Login →](#)

If you have difficulty logging in or would like to request online access to your FGA, please call your UBS Financial Advisor.

#### Log in to your account

User ID:

Password:

[Forgot your Password?](#) [Login](#)

Note: Your Password is case sensitive.

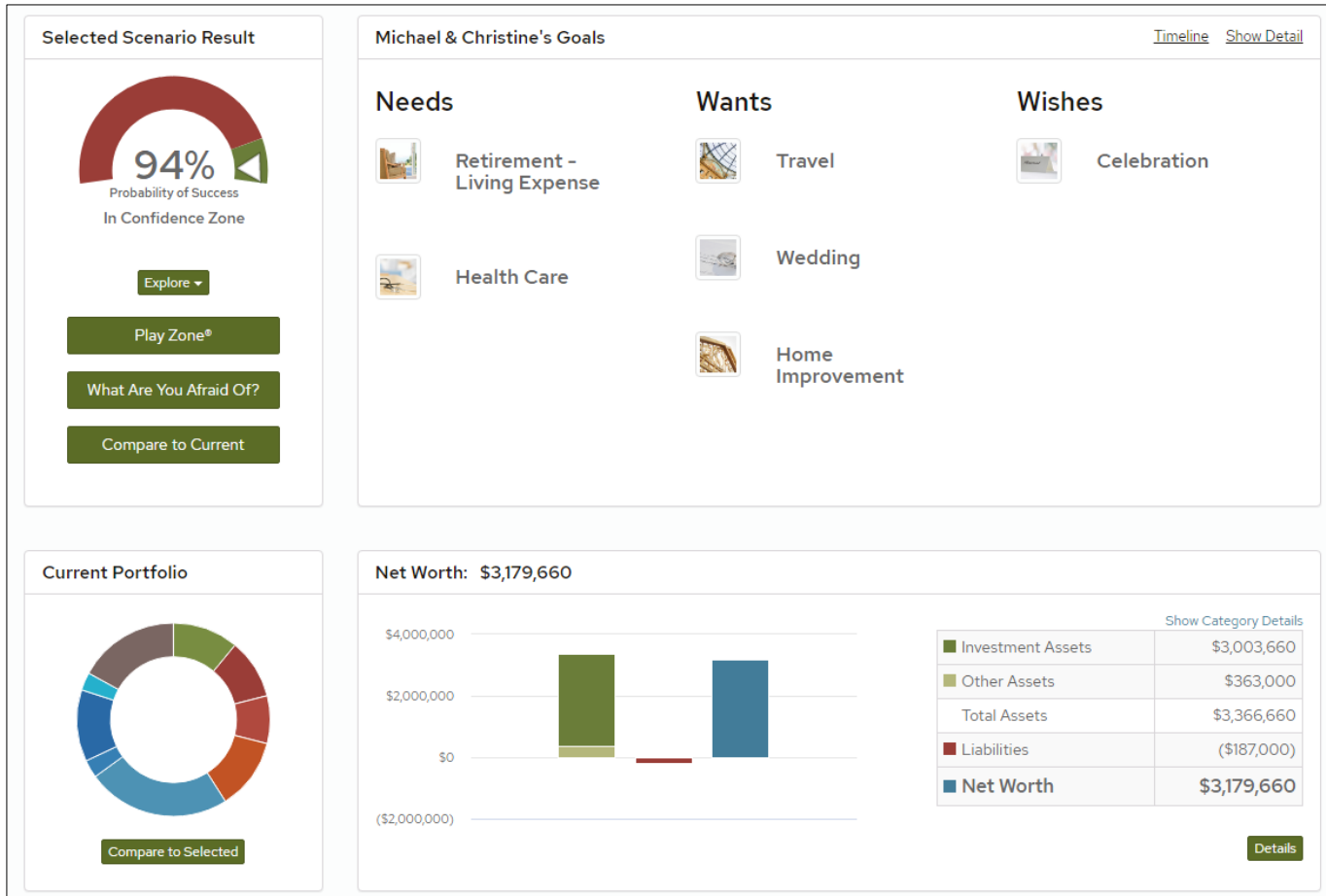
**For first-time users only:** Enter your user name and temporary password. You will then be prompted to create your own password for future access.

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.



The FGA Client Portal is hosted and managed by PIETech, Inc. ("PIETech"), a third-party service provider engaged by UBS and is provided solely for your convenience and information purposes only. UBS Financial Services Inc. and PIETech, Inc. are not affiliated. 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.

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.**

UBS Logout

Main Menu / My Plans / Financial Goal Plan (Projected)

About You Results Finish

Personal Information

Do you want to... or anyone who will be a donee, beneficiary or owner? 2 of 3

First Name	Date of Birth	Age
child	01/01/2015	1

Back Next

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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.

The screenshot displays the 'Results' tab of the UBS Financial Goals Advisor. At the top, there are navigation tabs for 'About You', 'Results', and 'Finish'. Below the navigation, a progress bar shows '3 of 6' steps completed. The main content area is titled 'Selected Scenario' and features a large gauge showing a 94% Probability of Success in the Confidence Zone, with an 'Explore' button below it. To the left, there are sections for 'Strategies' (Social Security, UBS Wealth Way, Risk / Reward) and 'Insurance'. Below that is the 'Options' section, which includes 'Choices', 'Play Zone', 'What If Worksheet', and 'SuperSolve'. The central part of the page shows 'Michael & Christine's Goals' categorized into 'Needs' (Retirement - Living Expense, Health Care), 'Wants' (Travel, Wedding, Home Improvement), and 'Wishes' (Celebration). At the bottom, there are 'Back' and 'Next' buttons. On the right side, a sidebar menu is visible, listing options such as 'Improve Your Plan', 'Current Scenario', 'What If Worksheet', 'Selected Scenario', 'Summary of Changes', 'Allocation Comparison', and 'What Are You Afraid Of?'. The bottom of the page has a navigation bar with 'Summary of Changes', 'Portfolio Comparison', and 'What are you afraid of?'.

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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 screenshot displays the 'Play Zone' interface with two columns: 'Play Zone Scenario' and 'Selected Scenario'. Both show a 94% Probability of Success 'In Confidence Zone' with a total spending of \$4,020,446. Below these are 'Goals' sliders for 'Michael's Retirement Age' (65), 'Retirement - Living Expense' (\$150,000), and 'Health Care' (100%).

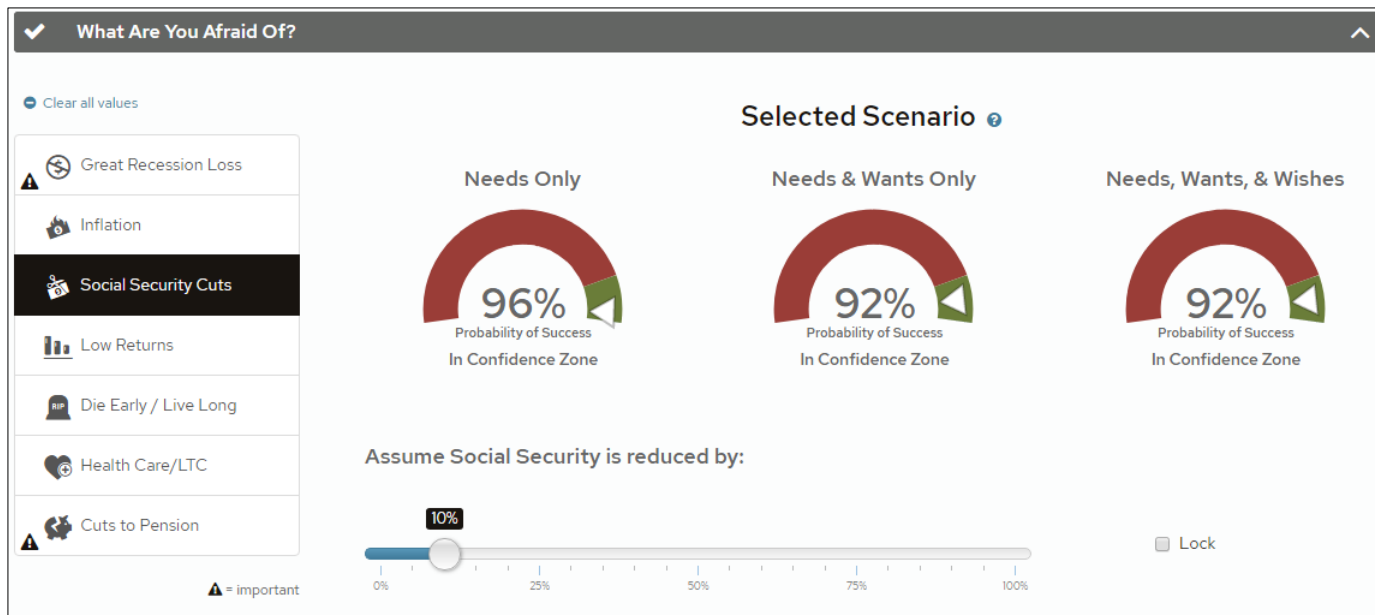
Category	Play Zone Scenario	Selected Scenario
Probability of Success	94%	94%
In Confidence Zone	Yes	Yes
Total Spending	\$4,020,446	\$4,020,446
Michael's Retirement Age	65 in 2023	65 in 2023
Retirement - Living Expense	\$ 150,000	\$150,000
Health Care	100 % or \$10,290	100 % or \$10,290

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.**

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