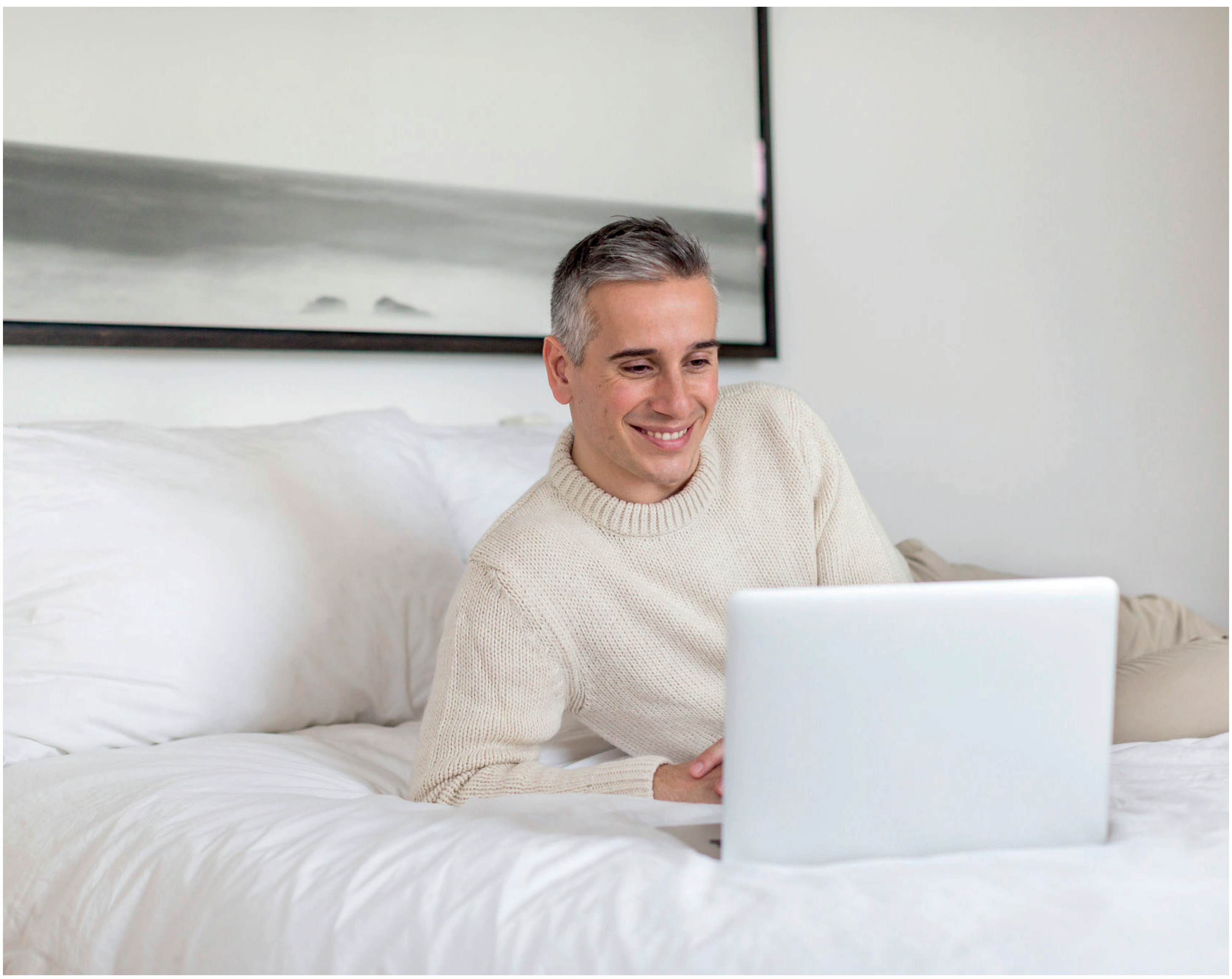
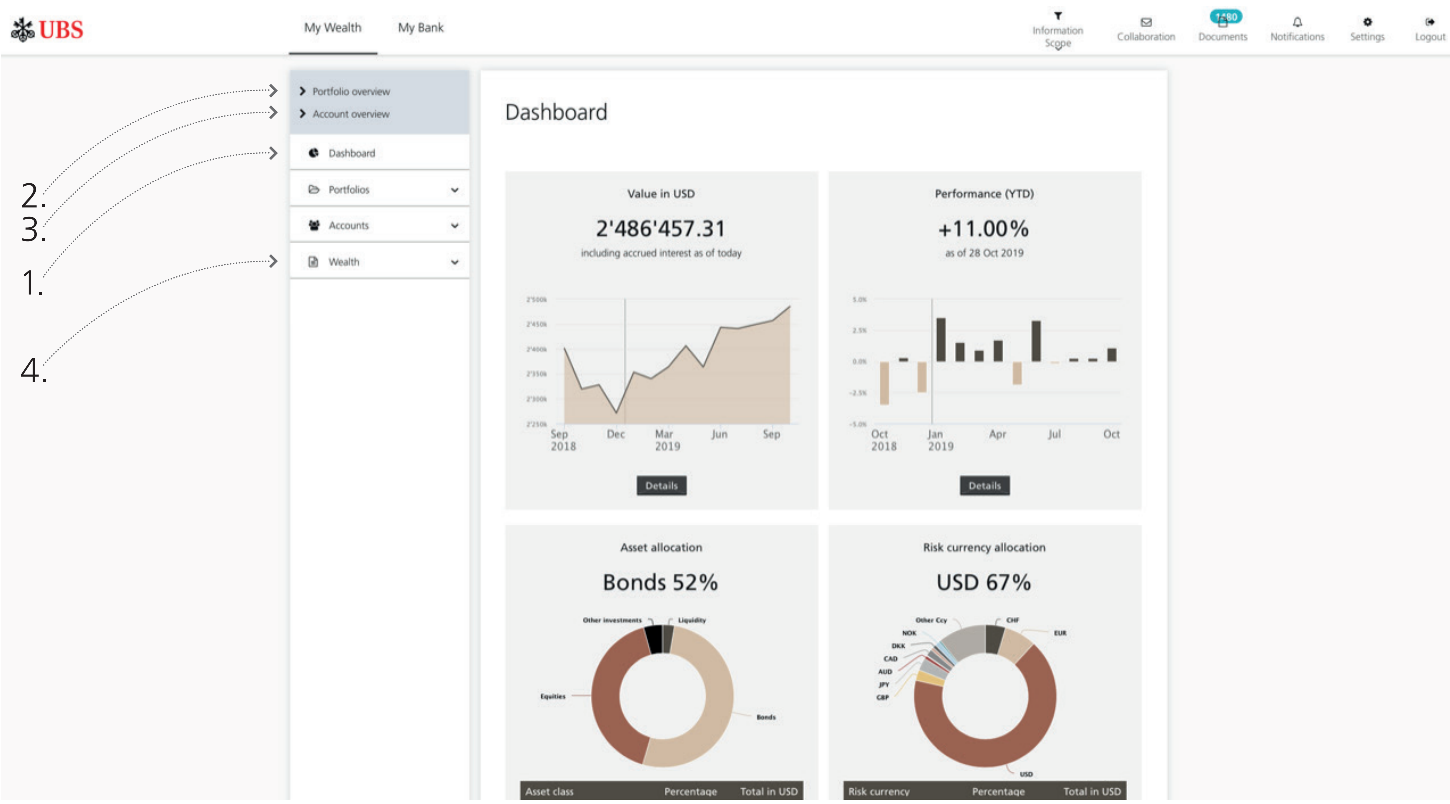
UBS Swiss Financial Advisers

UBS-SFA Online

User guide



My Wealth



1. Dashboard

Provides a high level overview by specific portfolio, including value, performance, asset allocation & risk currency allocation

2. Portfolio overview

- **Portfolio list:** Review portfolios and sort by type, cash value, time weighted rate of return ("TWRR") in %, instrument, value
- **Portfolio overview:** Review your total wealth, performance Year-to-date ("YTD"), and portfolio values
- **Portfolio performance:** Analyze each portfolio performance by various periods. Includes cumulative TWRR and TWRR for each year
- **Portfolio analysis:** Explore risk currency weightings, asset class weightings in your preferred reference currency. Review your asset allocation matrix

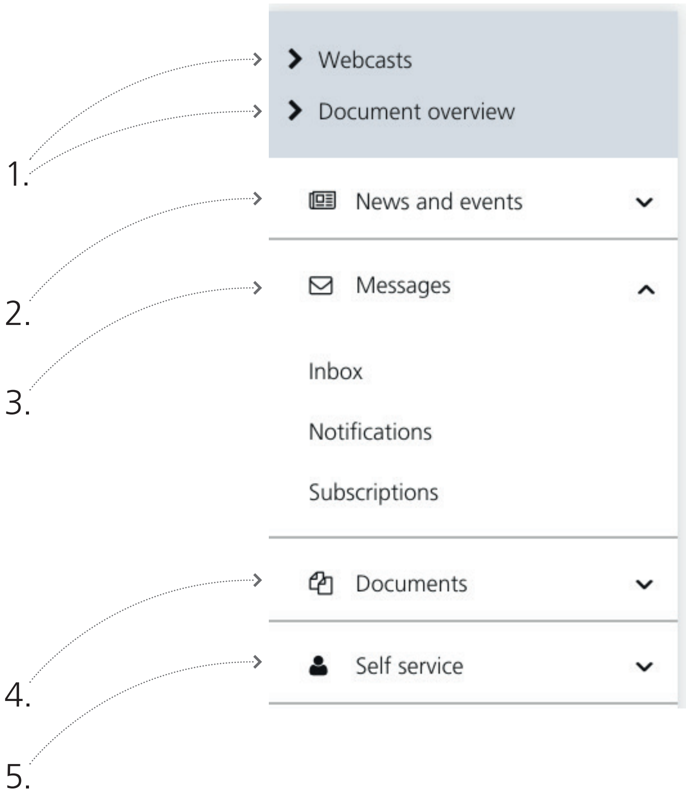
3. Account overview

- **Account overview:** Analyze your liquidity positions. Select further details
- **Bookings:** Review the bookings per account and filter by time period, booking text, beneficiary, reason for payment

4. Wealth

- **Wealth overview:** Explore your wealth by position level of each asset class by portfolio. Select your preferred reporting currency
- **Wealth positions:** Evaluate your positions and analyze your positions by cost price, market profit/loss ("P/L"), currency P/L, value in USD & risk currencies ("CCY")
- **Wealth transactions:** Review transactions by your preferred time periods. Review booking details
- **Maturity analysis:** Look over your fixed income positions by maturity date and currency in a yearly or monthly view in matrix form
- **Maturity list:** Examine your bond or money market positions by risk CCY, quantity, time period in list form

My Bank



1. Quick links to most used sub-functionalities

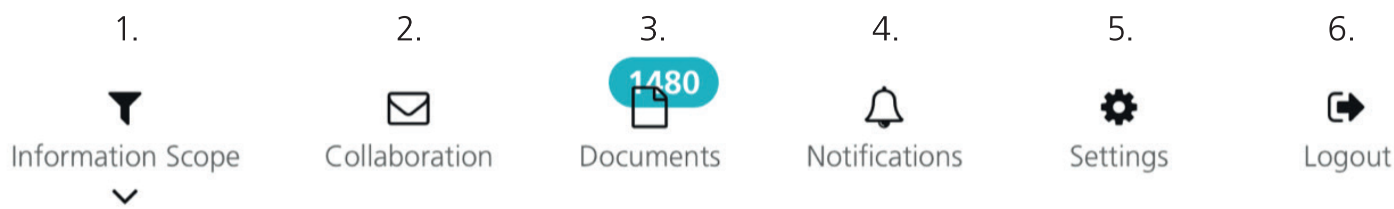
2. News and events
   Access to exclusive UBS webcasts, news, articles, publications and events

3. Messages
   Compose, receive messages from your Wealth Management Consultant
   - **Inbox:** Create messages, appointment or call back requests and manage messages
   - **Notifications:** View and manage notifications which you received
   - **Subscriptions:** Subscribe, edit or delete your e-banking or e-mail notifications

4. Documents
   - **Document overview:** Review your portfolio statements, deposit and trade advice in the document safe
   - **Order document:** Order ad-hoc portfolio or account statements delivered straight to your document safe
   - **Document subscriptions:** Order additional portfolio or account statements in your preferred time frame

5. Self-Service
   Communicate address change to the bank

Toolbar



1. Information scope
   Filter the content of My Wealth by portfolio or client. The functionality allows to keep client or portfolio selection through the various functionalities navigation

2. Collaboration
   Takes you to the inbox of your messages. Compose, receive messages from your Wealth Management Consultant. Request an appointment or a call back directly

3. Documents
   Redirects you to your document safe

4. Notifications
   Set up and receive notifications for your portfolios based on your selection

5. Settings
   Change your password or add alias' to your portfolios or accounts

6. Logout
   Safely and securely exit your E-banking

Contact us

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