

# An education resource for your employees

## Introducing UBS Financial Wellness Center



This dedicated online portal offers information on wide-ranging topics to help your retirement plan participants.

Visit  
[ubs.com/financialwellness](https://ubs.com/financialwellness)

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Financial knowledge and literacy are critical success factors in helping employees improve their financial wellness. That's why we built the UBS Financial Wellness Center for retirement plan participants. This dedicated online portal offers information on wide-ranging topics to help your retirement plan participants gain the confidence to make smart financial decisions and save for a brighter future.

### Valuable benefits for participants

- User-friendly online experience accessible 24/7
- Wide variety of financial topics to help participants gain knowledge and feel empowered to make important financial decisions
- Multimedia experience compatible with adult learning, including videos, podcasts, tutorials, interactive charts, articles and worksheets

### Great benefits for you, the plan sponsor

- Add value to your employee benefits with useful, actionable financial literacy and educational materials
- Support your objective to provide information and resources to participants that can help to increase their chances of having a secure retirement

### Content geared specifically for your participants

**Starting out:** When it comes to planning for retirement, it's best to start early. This section helps participants start off on the right foot with information on planning, budgeting and investing basics.

**Managing your priorities:** Guides participants on making the most of their asset-building years including education funding, catch-up strategies and mid-life investing.

**Nearing or in retirement:** What are the typical issues individuals face while nearing or during retirement? This section helps participants plan for healthcare costs, making money last and estate planning.

**Life events:** Life is full of surprises. This page offers checklists and important information on financial considerations related to major expected and unexpected life events.

**UBS insights:** Provides access to insights and intellectual capital from UBS through newsletters, publications, podcasts and more on important topics such as longevity, Social Security and Medicare.

### More resources for your employees

- In-person seminars for participants
- Education during participant enrollment and on an ongoing basis
- Articles on a variety of financial topics
- Whitepapers
- Newsletters
- Brochures
- Budgeting and other financial worksheets

### Have questions?

E-mail us at  
or call

## Three easy ways to educate your employees

**Inform** your employees about the availability of this valuable resource

**Incorporate** the benefits of the site in all your employee benefits communications including your HR website

**Provide** the link and encourage employees to explore the site at [ubs.com/financialwellness](https://ubs.com/financialwellness)

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