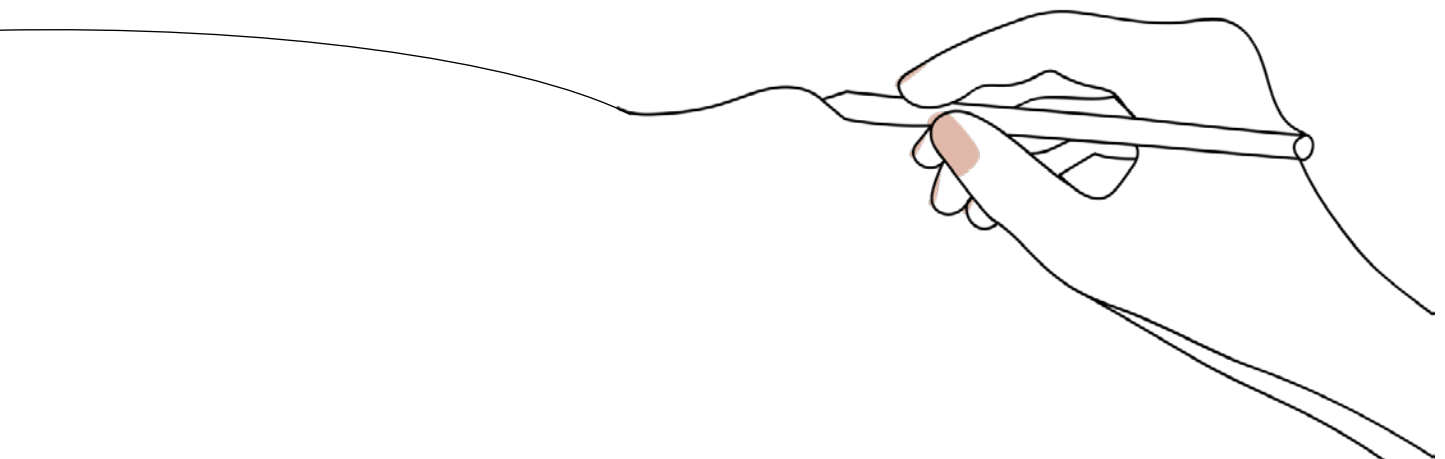




# Talk to an Advisor Checklist

- Financial and estate plans
- Savings and checking accounts
- Emergency funds
- Expenses
- Pensions and Social Security
- Retirement accounts
- Investment accounts
- Life insurance policies
- Long-term care policies
- Loans, credit lines and other debt
- Trust accounts
- Real estate
- Annual gifting
- Charitable giving



In providing wealth management services to clients, we offer both investment advisory and brokerage services which are separate and distinct and differ in material ways. For information, including the different laws and contracts that govern, visit [ubs.com/workingwithus](https://ubs.com/workingwithus).

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Expiration Date: 4/30/2020