

Digital client experience



Client digital form factor capabilities

Section		Web	iOS	Android
My UBS Accounts	Balances	✓	✓	✓
	Summary	✓		
	Holdings	✓	✓	✓
	Activity	✓	✓	✓
	Realized gain and loss	✓		
Combined UBS and external account view	✓	✓	✓	
Documents and reports	Statements and documents	✓	✓*	✓
	Portfolio reports	✓		
	Forms	✓		
	Secure mailbox	✓	✓*	

* Available on iPhone only.

Key features across your devices

Section		Web	iOS	Android
Banking services	Bill pay	✓	✓	✓
	Electronic Funds Transfer (EFT)	✓	✓	✓
	Checking services	✓		
	Remote deposit capture		✓	✓
	Digital ACATs	✓	✓	✓
UBS Advice advantage		✓	✓	✓
Financial tools and planning	Cashflow, Net balance, Spending	✓	✓*	✓
	Budgeting	✓		
	Financial goals assessment (My Plan)	✓	✓*	
Send and receive with zelle®. 1 at UBS		✓	✓	✓

* Available on iPhone only.

Key features across your devices

Section		Web	iOS	Android
Market and research analysis	Market info	✓	✓	✓
	Research analysis	✓		
	Investment research	✓		
	Performance	✓		
My profile	Update my e-mail	✓	✓	✓
	View my phone numbers	✓	✓	✓
	Change my password	✓	✓	✓
	Update my security settings	✓	✓	✓
	Enroll in e-Delivery	✓		
	Advisor contact	✓	✓	✓
Milestones		✓	✓	✓
Mindsets and interests		✓	✓	✓
Additional features	Card security	✓	✓	✓
	Relationships	✓	✓	✓
	Biometric authentication		✓	✓

Important legal notice (1/2)

¹ An eligible UBS account in the US is required to use Zelle®. Transactions between enrolled users typically occur in minutes.

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