How to get started

Simple steps to getting started with My Total Picture

With My Total Picture, a feature of UBS Online Services, you’ll be able to view whatever accounts you enroll—both inside and outside UBS—in one convenient place. Below are a few simple steps that can help you get started.

Getting started

The first time you visit, an informational page will display. Click the “Enroll Now” button and review the Terms & Conditions before enrolling.

Login to ubs.com/onlineservices and find the tab called “My Total Picture.”

Login to ubs.com/onlineservices and find the tab called “My Total Picture.”

Visit ubs.com/onlineservices for more information.

After accepting the Terms & Conditions, you will be prompted to search for your financial institution’s name on the “Add Account” screen.

View all results before making a selection since some outside institutions have several different sites for different account types. If there are multiple results, the site names will help you locate the correct institution.

Visit ubs.com/accountaggregation for more information.

Advice. Beyond investing. plan access save borrow grow protect give
Enter your credentials. Be sure to check the URL and confirm it’s the URL used to login to your outside financial institution.

Once enrolled, navigate the site more easily with this tab.

Note: Once you have entered your accounts and begin using My Total Picture, it is possible you may receive an alert that there is a data refresh error on an account. To avoid potential errors in refreshing information on your accounts, whenever you change login information for an outside account, always update that information in My Total Picture.

Quickly view your total assets and liabilities for both your UBS and non-UBS accounts.

Click here to add outside accounts on My Total Picture.
See detailed holding and transaction information for each of your accounts, including price, quantity and value.

See “Activity” for any account tied to My Total Picture.

**Helpful tips:**
- Before you enroll, gather key information for all your accounts, including usernames and passwords.
- Add all accounts in one sitting or do a few at a time—whatever makes you most comfortable.
- Some institutions will require an authentication process in order to allow the data to be pulled. This is normal. Follow the instructions when this occurs and complete as requested during setup to ensure a smooth experience.
- For a complete picture, remember to add liabilities such as credit cards and mortgages, as well as your assets and property.

The My Total Picture service enables UBS to retrieve information about your non-UBS accounts (“Outside Accounts”) at your direction from the other financial institutions’ websites. The service is provided for your convenience and information only. Unless we agree in writing otherwise, UBS does not provide advice or recommendations with respect to your Outside Accounts and is not responsible for activity or transactions you conduct in your Outside Accounts. UBS does not verify the holdings, valuations or other information we receive about your Outside Accounts. UBS Financial Services Inc.’s SIPC coverage and supplemental SIPC insurance only apply to eligible assets held by UBS Financial Services Inc.

© UBS 2017. All rights reserved. The key symbol and UBS are among the registered and unregistered trademarks of UBS. UBS Financial Services Inc. is a subsidiary of UBS AG. Member FINRA. Member SIPC.

UBS Financial Services Inc.
ubs.com/fs
161221-6959