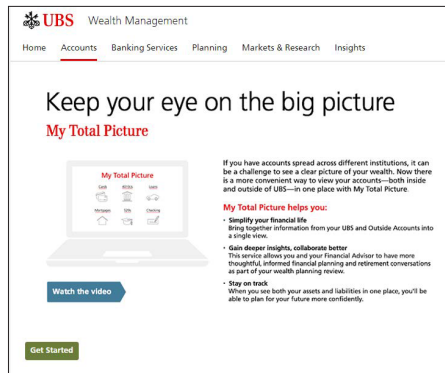


# How to get started

## 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

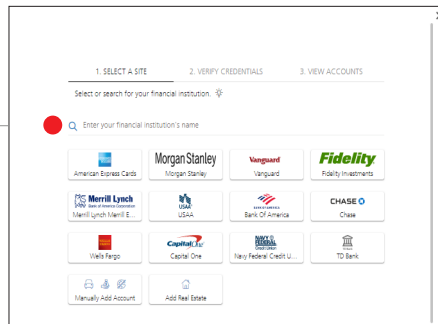


Login to [ubs.com/online services](https://ubs.com/online services) and find the tab called "My Total Picture." under Accounts in the header.

The first time you visit, an informational page will display.

Click the "Get Started" button and review the Terms and Conditions before enrolling.

After accepting the Terms and Conditions, you will be prompted to search for your financial institution's name on the "Add Account" screen.



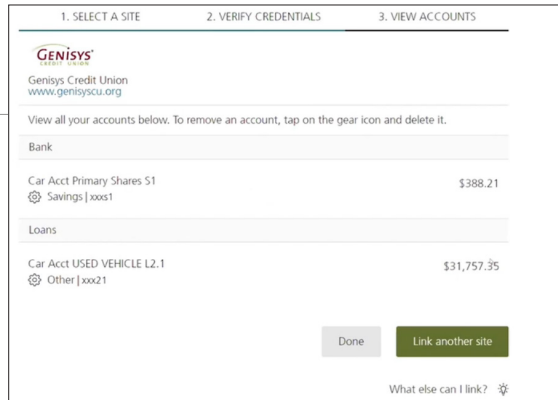
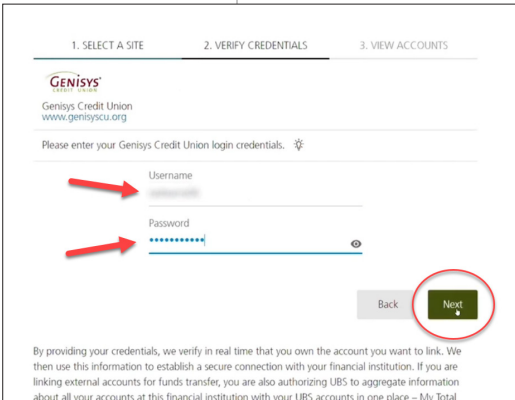
Results will be displayed based on the search.



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.

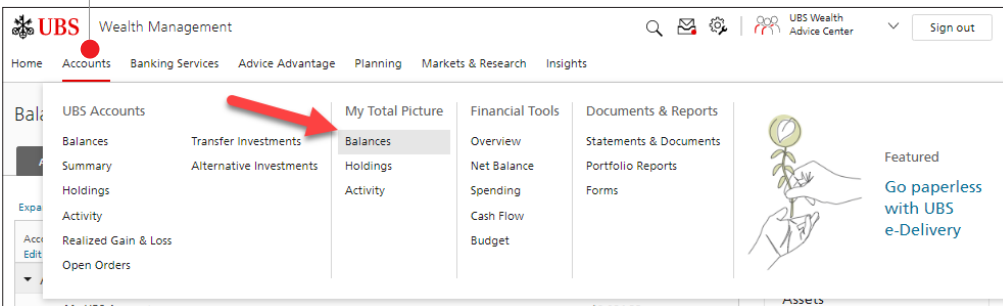
Visit [ubs.com/accountaggregation](https://ubs.com/accountaggregation) for more information.

Enter your credentials. Be sure to check the URL and confirm it's the URL used to login to your outside financial institution.

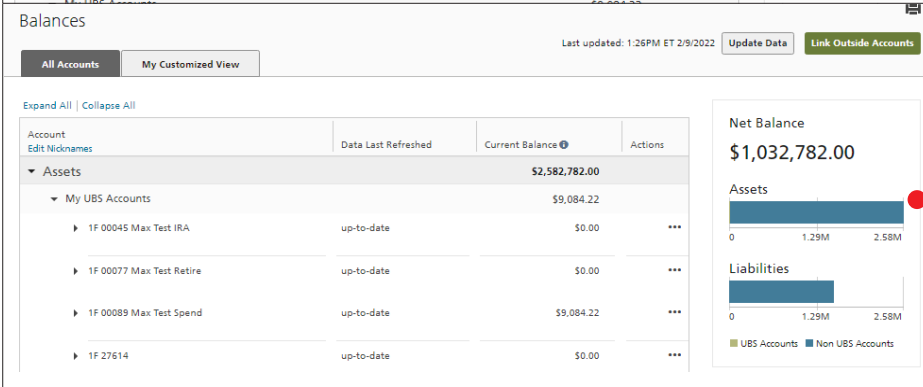


Select the gear icon to remove any accounts you might not want added. Once finished, select Done.

Once enrolled, navigate the site more easily with this dropdown menu.

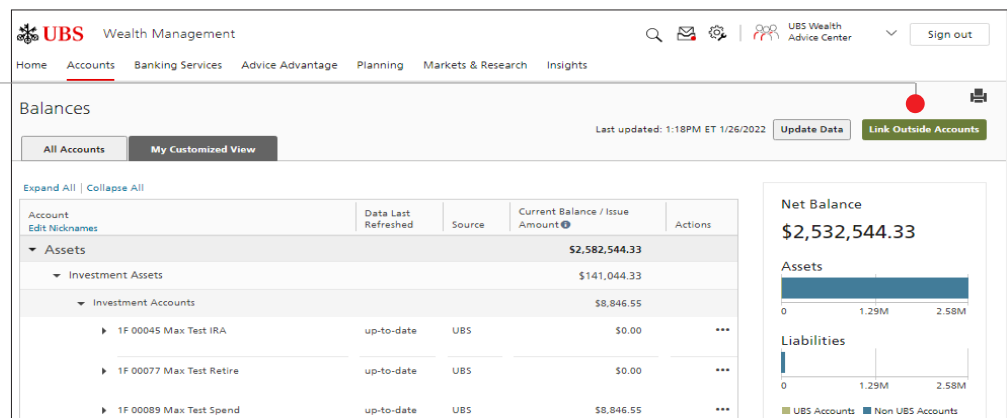


**Note:** Once you have entered your accounts and begin using *My Total Picture*, it is possible you may receive an alert that there is a data refresh error on an account. To avoid potential errors in refreshing information on your accounts, whenever you change login information for an outside account,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



UBS Wealth Management

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UBS Accounts

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My Total Picture

Balances

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Featured

Go paperless with UBS e-Delivery

See detailed holding and transaction information for each of your accounts, including price, quantity and value.

Expand All | Collapse All

Description	Last refreshed	Value
<b>Cash</b>		
▼ Cash/Money Funds/Bank Balances		\$183.46
▶ UBS Insured Sweep Program		\$183.46
<b>MONEY FUNDS</b>		
▶ Invesco Emerging Markets Equity Trust	08/21/21	\$2,666.71

Expand All | Collapse All

Description	Symbol	Last refreshed	Quantity	Price	Total Cost	Value
<b>Equity</b>						
▼ Closed End Funds And Exchange ...						
▶ ISHARES CORE MSCI EAFE ETF	IEFA	12 hours ago	33.000	\$71.59	\$2,038.62	\$2,262.47
▶ ISHARES CORE MSCI EMERGIN...	IEMG	13 hours ago	17.000	\$68.92	\$919.93	\$1,001.64
▶ SCHWAB US LARGE-CAP ETF	SCHX	13 hours ago	29.000	\$105.12	\$2,226.12	\$3,048.48
▶ SCHWAB US MID-CAP ETF	SCHM	13 hours ago	10.000	\$74.08	\$691.69	\$740.82

See "Activity" for any account tied to My Total Picture.

UBS Wealth Management

Home Accounts Banking Services Advice Advantage Planning Markets & Research Insights

Account

UBS 401k

Value

\$38,057.50

Activity

Date: 12/28/21 to 1/26/22 Symbol: All Activity: All

Reset Filters

Date	Activity	Description	Symbol	Quantity	Price/Value	Amount
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### 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.

\* Investing involves risks, including the potential of losing money or the decline in value of the investment. Performance is not guaranteed.

**By adding your Outside Accounts held at other financial institutions unaffiliated with UBS via My Total Picture, you authorize UBS and/or our service providers to use the required login credentials/information provided by you in order to access your Outside Accounts, retrieve your account information from other financial institutions' websites and publish such information as part of this service.**

*My Total Picture* is provided for your convenience and information only. Certain functionalities are provided by third party service providers engaged by UBS.

The information about your Outside Accounts (and any analysis or reports based on that information) may not be accurate if you do not provide current information or the service cannot properly refresh the data from your Outside Account. You should not rely on the information regarding your Outside Accounts for trading or transactional purposes. **Please note the last refreshed date/time shown for each Outside Account.** UBS does not verify or reconcile the holdings, valuations or other information we receive about your Outside Accounts or provide valuations of the assets or liabilities held in your Outside Accounts. The values ascribed to your Outside Account assets may vary from the values UBS would assign if UBS held the same assets because other financial institutions may use different sources for pricing data or different methodologies. For Outside Accounts denominated in a foreign currency, all balances and security prices UBS receives will be converted and displayed in US Dollars. 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.

Your UBS account statements are the only official record of your UBS Financial Services Inc. accounts. You should review and maintain the account statements and other documents provided by other financial institutions for your Outside Accounts, which may contain notices, disclosures and other important information. Cost basis or unrealized gain/loss information and classifications of the account types or asset categories for Outside Accounts are shown as received from the custodian of your Outside Accounts. UBSFS and its Financial Advisors do not provide tax advice. You should contact your custodian if you have any questions about your Outside Accounts.

Certain products and services described herein may not be available to all clients or in all jurisdictions. UBS Financial Services Inc.'s SIPC coverage and supplemental SIPC insurance only apply to eligible assets held by UBS Financial Services Inc. You should contact the financial institutions holding your Outside Accounts to inquire whether they are SIPC members and whether your Outside Accounts are protected by SIPC.

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