Confidence for your financial goals
Discover how Wealth Planning can help you
We’re here to help guide you on your life’s journey

Maybe you can clearly envision how you want your life to be. But, what if the path to what you want isn’t as clear-cut?

We can help you see the big picture—what you need today, what you want tomorrow, what you may be able to pass along in the future—to help you pursue your goals confidently.

With the right preparation, you can address your goals and needs

What’s the real impact of your financial decisions? Understanding that is the first step toward creating a financial plan with clear milestones every step along the way, so you can pursue your goals with clarity and purpose.

By proactively planning around the resources you have—and exploring the strategies already in place—you can plan for what you want to achieve and help prepare for the unexpected.

Insights to help you make informed decisions

Your UBS Financial Advisor has access to a wide range of specialists and experts to help you tackle your most complex financial challenges. So, wherever you are in life and whatever your needs, the knowledge, solutions and guidance available to you through wealth planning can give you the assurance you need to pursue the financial future you see for yourself.

98% of investors surveyed who have a plan agree that having one helps them focus on their long-term goals rather than market declines.
85% of investors surveyed want more guidance than usual during market volatility.²

Backed by the strength of the world’s largest global wealth manager

160+ year history of managing wealth

$2.7 trillion in invested assets globally³

$1.5 trillion in invested assets in North America alone³
Clear direction from planning

Just as a map guides you when traveling, a financial plan charts out your financial journey.

Created together with your UBS Financial Advisor, your plan lays out a clear path forward with key financial milestones and time frames aligned to your objectives. Separate from your financial plan, your Financial Advisor can also help identify potential investments, solutions and resources for different phases of your financial journey.

Here to support you

Along the way, your UBS Financial Advisor, along with our experienced wealth planning professionals, can assess your financial life and help guide you on strategies that can work together, based on your goals.

Since your life is dynamic, your plan should be too

Your financial plan is a flexible road map that can change as your life, the world and the markets change. Your Advisor can meet with you as needed to assess, adjust and refine your plan.
Intelligent future modeling

Your Financial Advisor can use our financial planning tools to illustrate how various planning strategies may impact your future net worth and your ability to meet your goals. They can also help identify opportunities and risks so you understand how your decisions today may impact your financial life tomorrow.

Our analysis can also illustrate different stress tests so you can see how your plan results may be impacted in different market environments. By fine-tuning your plan, we can assess your overall financial health.

As life changes, revisit your strategy

There are a few important moments throughout the year—and your life—where it makes sense to reassess things. These include:

- Beginning of year
- Tax time
- End of year
- Getting married
- Moving
- Birth of a child
- Starting a new job
- Portfolio reviews
- Buying a house
- Getting divorced
- Caring for aging parents
- Death in the family
- Receiving inheritance
- Nearing retirement
Get support for every area of your financial life

How often do you review your overall financial situation? Who do you rely on for advice and expertise in making or reviewing financial decisions? Your UBS Financial Advisor has access to a wide range of wealth planning and other financial professionals across the full spectrum of financial solutions available through UBS to provide deeper insight and guidance at any stage of your financial journey.

Wealth planning covers 360° of your financial life, including:

- Budgeting and cash flow
- Your net worth
- Asset allocation
- Education planning
- Long-term health care
- Income replacement
- Lifestyle assessment
- Charitable giving
- Liability management
- Estate planning strategies
- Tax planning considerations
We partner with you

You and your goals inform how we can help you. At UBS, planning is part of our wealth management framework and the five basic steps in how we can work together.

1. **Discover**
   - Have a conversation about what’s most important to you and share your financial information.

2. **Plan**
   - Build your financial plan and create strategies tailored to your specific needs.

3. **Agree**
   - Discuss and agree on your financial plan and next steps.

4. **Implement**
   - Identify solutions and coordinate with all of your financial professionals—including your UBS Financial Advisor, your CPA, estate attorney and more.

5. **Review**
   - Periodically review your plan with your UBS Financial Advisor to ensure it reflects your most recent goals and circumstances.

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Gain confidence moving forward

Connect with your UBS Financial Advisor to talk about how wealth planning can help you confidently pursue what’s important to you, at every stage of your life.
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