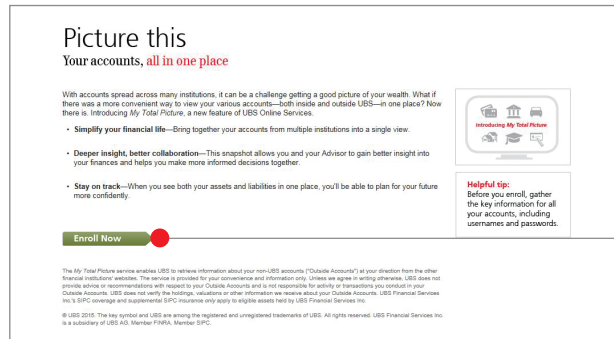


# How to get started

## 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

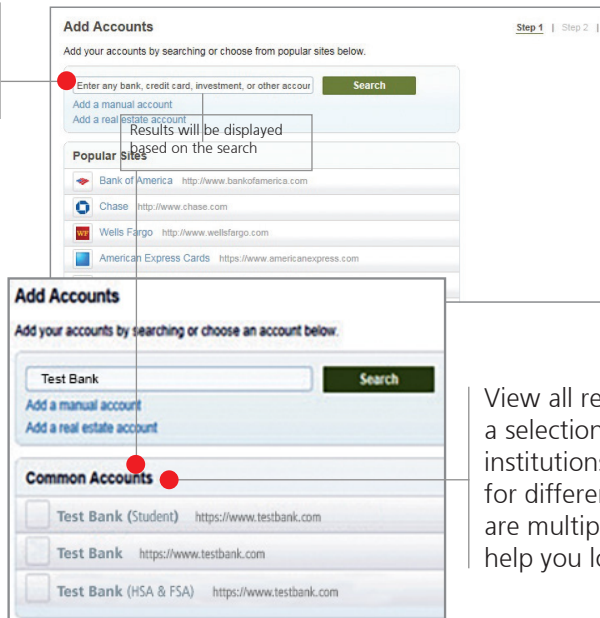


Login to [ubs.com/online-services](https://ubs.com/online-services) and find the tab called "My Total Picture."

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

Click the "Enroll Now" button and review the Terms & Conditions before enrolling.

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 types 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 accounts to add. You can also remove any accounts that you might not want to add.

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

Header	UBS	Non UBS	Balance
<b>Assets</b>	<b>\$3,240,115.25</b>	<b>\$1,968,001.43</b>	<b>\$5,208,116.68</b>
Investment Assets	\$3,240,115.25	\$468,001.43	\$3,708,116.69
Investment Accounts	\$2,041,115.26		\$2,041,115.26
Retirement Accounts	\$972,034.58	\$468,001.43	\$1,440,036.01
Education Accounts	\$226,808.07		\$226,808.07

**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.

Account	Data Last Refreshed	Source	Current Balance	Actions
<b>Assets</b>			<b>\$5,068,368.39</b>	
Investment Assets			\$2,081,469.39	
Investment Accounts			\$2,081,469.39	
Investment Account	up-to-date	UBS	\$0.00	***
Investment Account	up-to-date	UBS	\$0.00	***
Bank (xxxxxx53)	a day ago	Non-UBS	\$3,880.44	***
Bank (xxxxxx00)	a day ago	Non-UBS	\$2,321.29	***

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

The screenshot shows the UBS Wealth Management interface. At the top, there's a search bar and navigation links like 'Home', 'My UBS Accounts', 'My Wealth', 'Markets', 'Research', and 'Insights'. Below that, there are tabs for 'My Total Picture', 'Balances', 'Holdings', and 'Activity'. The 'Holdings' tab is active. It displays '2 Accounts' and a total value of '\$29,291,778.60'. A red dot points to the 'Holdings' section. Below this, there are two tables of holdings. The first table is for 'Equity' and shows one holding: 'O'CONNOR GBL MULTISTRAT A...' with a quantity of 0.000 and a value of \$1,654,274.00. The second table is for 'Fixed Income' and shows two holdings: 'BANCOLOMBIA SA DTD 9/11/2...' and 'BARCLAY PLC DTD 11/20/2013...', both with a quantity of 0.000 and values of \$769,561.00 and \$1,388,355.00 respectively.

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

The screenshot shows the UBS Wealth Management interface with the 'Activity' tab selected. It displays 'Bank of America - Bank (xxx...)' as the account. A red dot points to the 'Activity' section. Below this, there are filters for 'Date' (30 Nov 16 to 29 Dec 16), 'Symbol', and 'Activity'. A table shows transaction history with columns for Date, Activity, Description, Symbol, Quantity, Price/Value, and Amount. Three transactions are listed, all as 'Debit' transactions on 12/27/16, with amounts of -\$0.64, -\$15.89, and -\$40.00.

### 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