



(UBS)

# Your money. Your goals. Your future.

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**Everyone has a different path when it comes to pursuing their financial goals. Customized wealth planning solutions from UBS can help you pursue your goals with confidence no matter where you are in life.**

Our comprehensive wealth planning services cover 360° of your financial life. Working with you, your UBS Financial Advisor brings the expertise to craft your plan, helping you and your family make informed decisions and pursue what's most important.

## **What can wealth planning do for you?**

- **Guidance**

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?

- **Preparation**

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

- **Focus**

98% of investors surveyed who have a plan agree that having one helps them focus on their long-term goals rather than market declines.

Our wealth planning process, along with the UBS Wealth Way framework can organize your financial life into three strategies to help give your wealth more clarity and purpose:

- Liquidity—to help provide cash flow for your short-term needs
- Longevity—for goals throughout your lifetime
- Legacy—to assist the people and causes you care about beyond your lifetime

[Learn more about UBS Wealth Way: Your money beyond stocks and investing.](#)

### **Start planning with UBS**

Speak with your UBS Financial Advisor to start the financial planning process or continue important planning conversations you may already have had. You'll learn more about how planning can help you feel more confident and in control of your financial future. Your Advisor can also connect you with an entire team of Wealth Planning specialists who can help inform your decisions.

### **Leverage the guidance of wealth planning professionals**

Your UBS Financial Advisor has access to sophisticated Wealth Planners with advanced degrees and designations who can help you:

- Tackle complex financial and wealth challenges
- Explore comprehensive strategies aligned to your individual situation
- Have the confidence to pursue the financial future you envision

[Click here to connect with a UBS Financial Advisor.](#)

*UBS Wealth Way is an approach incorporating Liquidity. Longevity. Legacy. strategies that UBS Financial Services Inc. and our Financial Advisors can use to assist clients in exploring and pursuing their wealth management needs and goals over different time frames. This approach is not a promise or guarantee that wealth, or any financial results, can or will be achieved. All investments involve the risk of loss, including the risk of loss of the entire investment. Time frames may vary. Strategies are subject to individual client goals, objectives and suitability.*

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