At UBS, wealth is about more than stocks and investing. It's about you. (UBS)

Are you being authentic about managing your wealth?

28 November 2023, 7:27 pm CET, written by UBS Editorial Team

Did you know that Merriam-Webster's 2023 word of the year is *authentic*. The online dictionary defines authentic as "true to one's own personality, spirit, or character." The word has experienced an uptick in searches this year perpetuated by discussions about AI, identity, pop culture, and social media, ultimately indicating a yearning for what is genuine.

Technology has begun to progressively disrupt and encompass nearly all aspects of our everyday lives, leaving individuals to increasingly seek an identity or lifestyle "based on fact" or one that is "not false or imitation."

Just as authenticity is about being true to one's character, an authentic investment portfolio reflects an alignment with an investor's financial goals and values.

At UBS, wealth is about more than stocks and investing. It's about you.

Our framework is designed to help you turn your possibilities into a plan. It starts with questions and a conversation to uncover everything that's important to you—beyond your money and wealth. Then, we organize your financial life in a way that gives you confidence you'll have what you need—when you need it.

Take an approach to your wealth that works for you and your entire financial life. Whether you're pursuing retirement, making an investment or forging a legacy, understanding the bigger picture is the first step to helping you pursue your financial goals today, tomorrow and for generations to come.

- What do you want to accomplish in your **life**?
- Who are the **people** that matter most to you?

- What do you want your **legacy** to be?
- What are your main **concerns**?
- How do you **plan** to achieve your life's vision?

From there, we can help organize your financial life into three strategies – Liquidity, Longevity and Legacy.

Click here to learn more about the UBS Wealth Way, or reach out to your Financial Advisor to make sure your wealth plan is authentic to you.

Are you a client? **Log in to reach your Financial Advisor.**
Not yet a client? **We'll help you find a Financial Advisor.**

Main contributor: Shawn Awan

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.