

# Building the bridge between your goals and investments

Sound decisions are built on transparency. Making the right investment decisions to meet your goals, such as your retirement, passing wealth on to your children or your charitable ambitions can be complicated by an array of unique challenges—ever-changing markets, career changes, and new and intricate products to digest. Addepar makes it easier for you and your extended team to break down how your money is allocated, discuss what strategies are guiding your decisions and make more informed recommendations.

## Simplify your understanding of your investments

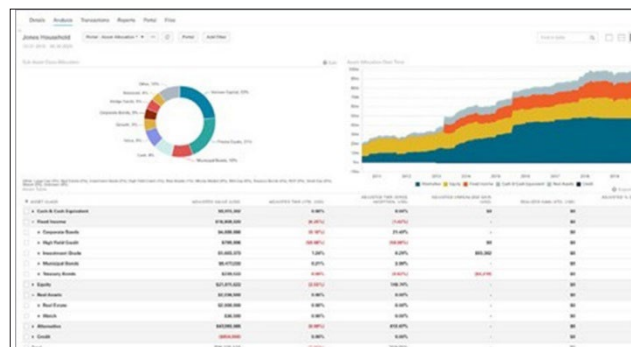
Addepar provides an intuitive, transparent investing experience. Our aim is to simplify the analysis and representation of your holdings so you and your extended team can answer any of your questions quickly—with the level of detail that's right for you, and in terms you'll understand.

Addepar's platform allows you and your extended team to:

- **See all your wealth in a single place** | Gain a holistic and transparent view of your portfolio on a single screen or report.
- **Perform detailed analysis** | See performance over various time periods to determine which investments are performing well and where adjustments need to be made to achieve your goals.
- **Receive personalized advice** | Advisors can tailor what and how data is represented, allowing them to answer your portfolio and performance questions in real-time in a way that makes sense to you.

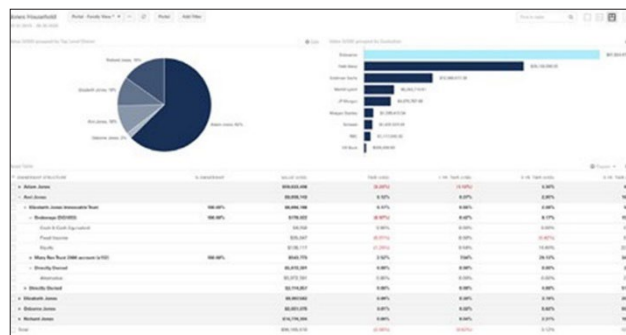
## See all your wealth in a single place

Get a complete picture of everything you own—from your stocks and bonds to alternative investments that include real estate, private equity, hedge funds and private collections—regardless of where your assets are held. Benefit from total wealth transparency—seeing portfolio and security returns over varying time periods against proper benchmarks, regardless of who's managing them. No noise, no multiple reports, no subjectivity. Giving you and your extended team timely information to ensure you're on track to meet your goals.



## Perform detailed analysis

With Addepar's modern capabilities providing a broad-based view of your wealth, you and your extended team will better understand and be better aligned with your goals—not just for the specific assets they manage, but also across your entire set of holdings. They will be able to see performance over time, evaluate which investments are performing well and quickly make any necessary adjustments should the markets or your goals change.



### Personalize your advice

Dissecting multiple reports across numerous managers and asset classes can make it challenging to determine what requires your attention. Using our simple-to-read and easily digestible reporting and our access-from-anywhere client portal, your Advisor can categorize your assets and tailor reports to display your portfolio and asset performance.



### Getting up and running

Mirador will be operating the Addepar software on behalf of UBS's clients. Mirador's Addepar expertise goes beyond just optimizing analytics and reporting outputs. Their team is skilled in all aspects of data management and visualization so that historical data is extracted from your current platform and reformatted to fit Addepar in an accurate and efficient way.

### Optimize Addepar usage

Addepar is a platform designed to be pushed to its full potential. The combination of flexible data structures and custom attributes means there are hundreds of possible ways to analyze and represent data. Whether it is leveraging one of Mirador's prebuilt templates or designing a solution for a specific client use case, Mirador's team can customize your platform and streamline workflows to meet your evolving needs.

### Dedicated team of experts

Instead of a call center, where you submit service tickets, you have a dedicated Mirador Client Advocate support team. They personally work with you to understand your needs, goals, and unique ownership/family and legal entity structures. Their services are tailored to you to maximize value to your financial life.

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