Ahead with confidence

The Capitol Group IC is dedicated to making it possible.

UBS

It starts with you

What are the things that really matter to you? Your answer to that question is the crux of a relationship with us. It's the basis for all we do on your behalf. It's the ever-present theme behind every conversation—and leads to a plan that helps you pursue your financial goals today, tomorrow and for generations to come.

Our planning approach helps you to move forward with your greatest ambitions no matter what life or the markets bring. Our team offers advice and guidance based on years of experience helping individuals and families pursue their most important goals. By tapping into the robust connections and resources of UBS with 70,000+ employees in over 50 countries, we are uniquely positioned to help you live the life you want.

Let's make it happen.

"We provide a personalized experience that brings all the pieces of our clients' financial lives together."

- Leland B Bishop III, CIMA®, CPFA®

The Capitol Group IC
UBS Financial Services Inc.
1150 17th Street NW
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Advice for who you are

Everyone is different, so we tailor your experience to your personal goals and circumstances. Our team also provides focused advice to specific groups who share common backgrounds. This allows us to gain insights into specific needs and provide additional support, so we can better help you forge your path forward.

Helping you realize your organization's long-term vision
Our team can introduce you to the UBS Institutional Consulting Group which offers customized solutions centered on your firm's evolving needs. They offer a multidimensional approach that leads to deeper, more insightful Solutions, combining the power of Financial IQ (FQ) with the empathy of Emotional IQ (EQ). It is a simple, powerful philosophy that is woven throughout our retirement plan and institutional consulting services.

Feeding the passion of business owners
Being a business owner takes commitment, flexibility and a lot of hard work. That's why we offer specific advice, tactics and resources to help you make the most of being a business owner and transition away from your company when the time is right.

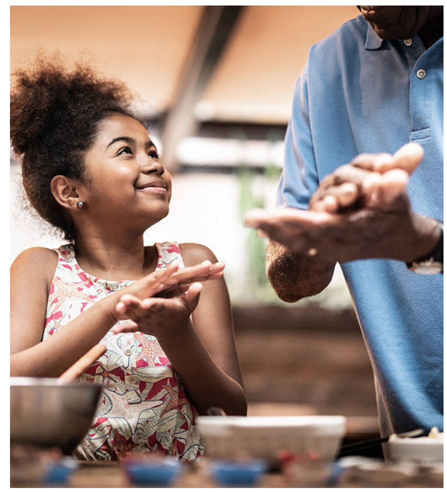
Helping women own their worth
Eight out of 10 women will one day manage finances alone, but many are not deeply involved in financial decisions that affect their lives. By partnering with us, you'll have access to ongoing research and special events designed to give women more confidence to pull up a seat at the money table and participate in major financial decisions. Read our latest research.

Setting up today's rising generation for success
We recognize that investors under 40 have had it tougher than other generations. Yet in the face of it all, you're still optimistic and have an unshakable desire to make the world a better place. By partnering with us, you'll have access to an extensive online financial literacy program, financial guides, virtual seminars, podcasts and videos, all designed around how you see the world.

Priorities take planning

You want to be able to move forward with your greatest ambitions no matter what life or the markets bring. Our team offers advice and guidance that can give you confidence you are on track to reach your financial goals. We are uniquely positioned to help you live the life you want.

Gain insightful advice tailored to you
We see our key role as helping you pursue what is important to you. We start by getting to know you—who you are, what you care about, your tolerance for risk and your goals for the future. Then we help you analyze your priorities to determine an appropriate plan to meet your goals. Of course, as changes happen in life and the world, your goals and priorities will likely change as well. We work together to address these changes to ensure your financial plan continues to set a path toward what matters most to you.



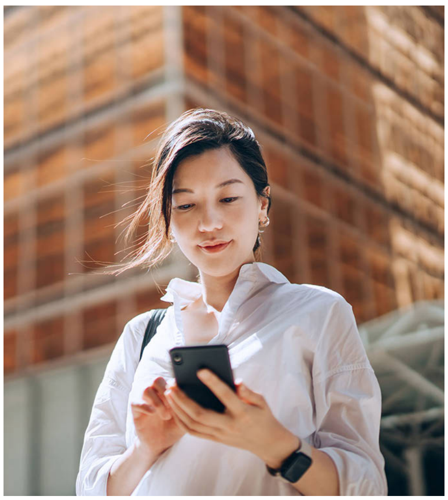
Feel confident about life after work
Financial security in retirement is something that everyone is concerned about. Will it be the retirement you have always envisioned? Together we'll build a dynamic financial plan that can adjust as you move from saving for retirement to transitioning to retirement to living in retirement.

Connecting you to the deep resources of UBS

By seeing the big picture, we provide access to the global platforms and the financial and intellectual strengths of UBS's experts in Wealth Management, Asset Management and our Private and Investment Banks.

Investing for what matters most

We take a holistic approach to wealth management that's built on top of the solid foundation of intellectual capital, expertise and broad investment offering found at UBS. We partner with you to establish a portfolio designed for the future you envisioned, and then adapt it to the natural changes that happen along your journey.



"In an uncertain world, confidence comes from having a plan you believe in-and a team you trust"
- Brock Van Selow

Insights founded on years of expertise
Through our team, you have access to leading insights from the UBS Chief Investment Office (CIO), which provides 24/7 analysis of economies, markets and social trends around the world. These insights can help inform your investment decisions and guide your portfolio management, depending on your needs. Nearly 200 UBS investment analysts globally provide commentary that can help identify investment opportunities while managing risk. UBS also talks with over 16,000 investors every year to keep a finger on the pulse of what matters.

Unlocking a wealth of possibilities
As part of the world's largest global wealth manager, we are able to offer you customized investment solutions usually reserved for institutional investors. From separately managed accounts and tax optimization services to direct deal opportunities and alternative investments, you have access totailored solutions for the full range of your investment needs.

Investing to improve the world
At UBS, we believe sustainability is relevant to how you manage your wealth. Sustainable investing can help you advance your financial goals while contributing to sustainability outcomes. We invite you to discover the world of sustainable investing and the possibilities it offers you to pursue what matters most. UBS has been implementing sustainable investment strategies for investors across the globe for over 20 years.

A broad financial life needs a holistic approach

Wealth is more than your investments. By adding cash management, deposits and lending into the picture, we can have a better understanding of how your money works together—ensuring it's all doing its part in service to your goals.

A commitment to excellent service
We are committed to building lasting relationships with each client and take pride in responding to your requests in a timely fashion and working to address your needs, no matter how small or complex. In providing you with customized service and solutions, we always strive to exceed your expectations.

Making your money work harder
A holistic approach to your wealth enables you to do so much more to realize your vision. Combined with your investments, cash management from UBS Financial Services Inc., as well as savings and borrowing strategies from UBS Bank USA, can help your money work harder and smarter.

Our comprehensive approach to wealth management helps ensure that your financial plan fully addresses your various needs and goals. The team at The Capitol Group IC has but one purpose — to help you pursue what matters most.

We look forward to hearing from you.

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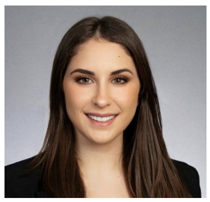

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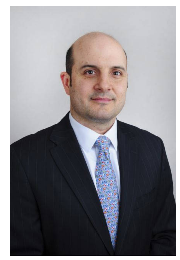

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Important information about brokerage and advisory services.
As a firm providing wealth management services to clients, UBS Financial Services Inc. offers investment advisory services in its capacity as an SEC-registered investment adviser and brokerage services in its capacity as an SEC-registered broker-dealer. Investment advisory services and brokerage services are separate and distinct, differ in material ways and are governed by different laws and separate arrangements. It is important that you understand the ways in which we conduct business, and that you carefully read the agreements and disclosures that we provide to you about the products or services we offer. For more information, please review client relationship summary provided at **ubs.com/relationshipsummary**, or ask your UBS Financial Advisor for a copy.

Neither UBS Financial Services Inc. nor its employees (including its Financial Advisors) provide tax or legal advice. You should consult with your legal counsel and/or your accountant or tax professional regarding the legal or tax implications of a particular suggestion, strategy or investment, including any estate planning strategies, before you invest or implement.

ESG/sustainable investing considerations.
Sustainable investing strategies aim to consider and in some instances integrate the analysis of environmental, social and governance (ESG) factors into the investment process and portfolio. Strategies across geographies and styles approach ESG analysis and incorporate the findings in a variety of ways. Incorporating ESG factors or Sustainable Investing considerations may inhibit the portfolio manager's ability to participate in certain investment opportunities that otherwise would be consistent with its investment objective and other principal investment strategies. The returns on a portfolio consisting primarily of ESG or sustainable investments may be lower or higher than a portfolio where such factors are not considered by the portfolio manager. Because sustainability criteria can exclude some investments, investors may not be able to take advantage of the same opportunities or market trends as investors that do not use such criteria. Companies may not necessarily meet high performance standards on all aspects of ESG or sustainable investing issues; there is also no guarantee that any company will meet expectations in connection with corporate responsibility, sustainability, and/or impact performance.

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