Our new client engagement process

1 Discovery Meeting

Through deep conversation, we capture what's important to you

- Your goals, concerns & considerations
- The people & causes that matter most
- Your current wealth planning
- Your key financial information
- A professional intro to UBS & our team

2 Presentation Meeting

We discuss our assessment, observations and proposed engagement

- Our preliminary wealth assessment
- Summary of key observations & issues
- Our custom planning offering
- Key deliverables overview
- Proposed meeting timeline
- Proposed flat fee-based planning cost

3 Engagement Decision

We mutually define engagement, agree and move forward

- Address follow up questions
- Mutually determine fit
- Define engagement scope & cost
- Gain mutual commitment
- Administrate engagement

We offer fee-based financial planning services as an investment advisory service that creates a fiduciary relationship under the Investment Advisers Act of 1940. Please reference the "Financial Planning Services Agreement" & Disclosure Brochure which sets forth the terms and conditions under which UBS will provide you with financial planning services.

Contact Information

Chrysalis Wealth Partners

UBS Financial Services, Inc.

12220 El Camino Real, Suite 400

San Diego, CA 92130

Tel. 888-468-0320, Fax 888-844-0235

International 858-947-7128

advisors.ubs.com/cwp

UBS

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Asset Allocation does not guarantee a profit or protect against a loss in a declining financial market.

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