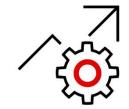
# Our wealth planning process for a liquidity event

Appropriate wealth planning before & after a liquidity event can potentially result in considerable savings. Start early.

#### **Pre-Liquidity Event Planning**















**Build a Team of Professionals\*** 



Develop a **Financial Plan** 



**Evaluate Estate** & Tax Planning **Alternatives** 



De-Risk



**Engage Your Family** 



Prepare for life after heirs, educate, communicate

**Align Proceeds** with Your Plan



Organize your financial life into three key strategies: Liquidity. Longevity. Legacy.

Coordinate advice across a wealth manager, CPA, and estate attorney

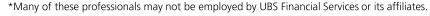
Discover goals, model scenarios, analyze considerations, assess trade-offs. stress test

Potentially maximize net proceeds to you and the people & causes you care about most

Plan for the unexpected and protect against risk. **Fstablish** contingency plans

sale, establish family governance, prepare

Your Curated UBS Coverage Team & 3rd Party Professionals





## **Contact Information**

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