



Financial Dreams Kickstart Guide

Dreaming about what you want your money to do can be fun. Use this Financial Dreams Kickstart Guide to get going.

- What do you want to accomplish in your **life**?

- What are your main **concerns**?

- What do you want your **legacy** to be?

- Who are the **people** that matter most to you?

- How do you **plan** to achieve your life's vision?



In providing wealth management services to clients, we offer both investment advisory and brokerage services which are separate and distinct and differ in material ways. For information, including the different laws and contracts that govern, visit ubs.com/workingwithus.

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