

Endowus Personal Investment Accounts for UBS HK Employees

Investing with a *compliance-friendly funds platform*

Endowus is Asia's leading wealth management and funds platform. With UBS as one of our key shareholders, we provide expert-curated portfolios, advice and access to institutional-quality investment solutions to clients at low fair fees.

UBS' compliance team has advised that, **generally accounts with the capability to only invest in unit trusts, are out-of-scope for disclosure for most staff** (except for those in UBS Asset Management or in a sensitive/restricted role). Refer to the UBS PAD policy to confirm whether your role is in-scope, or ask a question via goto/EIA.

Designed by and for finance professionals, Endowus is built to support your wealth goals and compliance reporting needs. Feel free to email us on support.hk@endowus.com if you have any questions.

Onboard in just a few minutes

1 Create an Endowus account and enjoy exclusive 20% off discount as an UBS employee

Onboarding can be done online in a few minutes.

Sign up using the link below or scan QR code to claim an exclusive offer of 20% for 3 years:
https://endowus.com/en-hk/r?code=UBS20_PNZ4WA3XT9



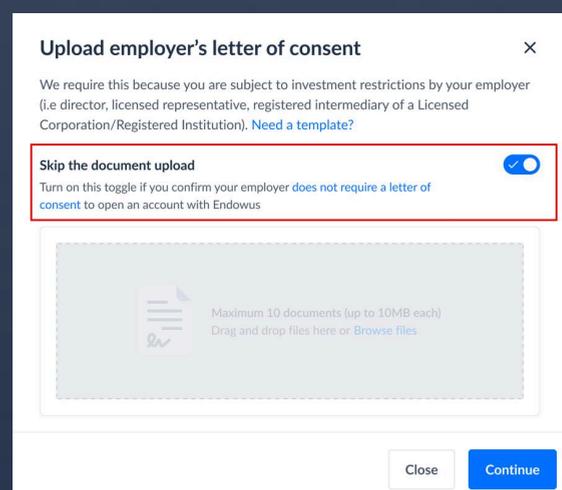
Scan to get started

2 Skip employee consent letter if unit trust investing investment account is out-of-scope for disclosure

Endowus is an open-ended funds platform. Per UBS compliance, accounts that have the capability to only invest in unit trusts are generally out of scope for disclosure for most staff. Refer to the UBS PAD policy to confirm whether your role is in scope. Disclosure is done on a post-basis via goto/EIA.

Skip the upload of consent letter during onboarding if you are not required to.

If you were to invest in alternatives (such as hedge funds and semi-liquid private credit/ equity products), please refer to the Global Policy on Personal Investment for disclosure and pre-clearance before investments.



3 Account approved. Start investing, transfer-in fund holdings to enjoy cost savings or schedule a 1-on-1 advisory appointment

Access over 350+ institutional-grade strategies from 90+ global fund managers at the lowest cost achievable, from cash management, public markets to hedge funds and private markets.

Through Endowus, you can design and manage your multi-manager, multi-asset-class investment portfolios. You can also transfer over fund holdings from other platforms to enjoy instant cost savings.

Learn more at endowus.hk or schedule a one-on-one consultation with our SFC-licensed client advisors to get started on a personalised wealth plan.

PUBLIC MARKETS

AllianceBernstein • Abrdn • Allianz • Amundi Barings • BlackRock • Capital Group • Dimensional Fidelity • Franklin Templeton • M&G • MSIM PIMCO • Schroders • T Rowe Price *and more...*

HEDGE FUNDS

AQR • Balyasny • Brevan Howard Campbell & Company • Capula • Hudson Bay LMR • Lumyna • Point72 • Verition *and more...*

PRIVATE MARKETS

Ares • Carlyle • EQT • HarbourVest • HPS KKR • Macquarie • Oaktree *and more...*