



Smart. Simple. Better.

Welcome to UBS Online Services

UBS Online Services is a powerful online resource designed to help you manage your finances efficiently and conveniently.

All accounts in one place

See your UBS investment and banking solutions accounts for a consolidated view of your finances.

My Total Picture

Get a clearer picture of your entire financial life by seeing all your accounts—even those you hold at other financial institutions.

Trending Topics

Get timely information that can impact your finances and help you take decisive action.

Banking solutions

Access credit line, mortgage and credit card accounts and pay bills in just a few clicks.

My Interests

Customize your home page with the information you want.

Navigation

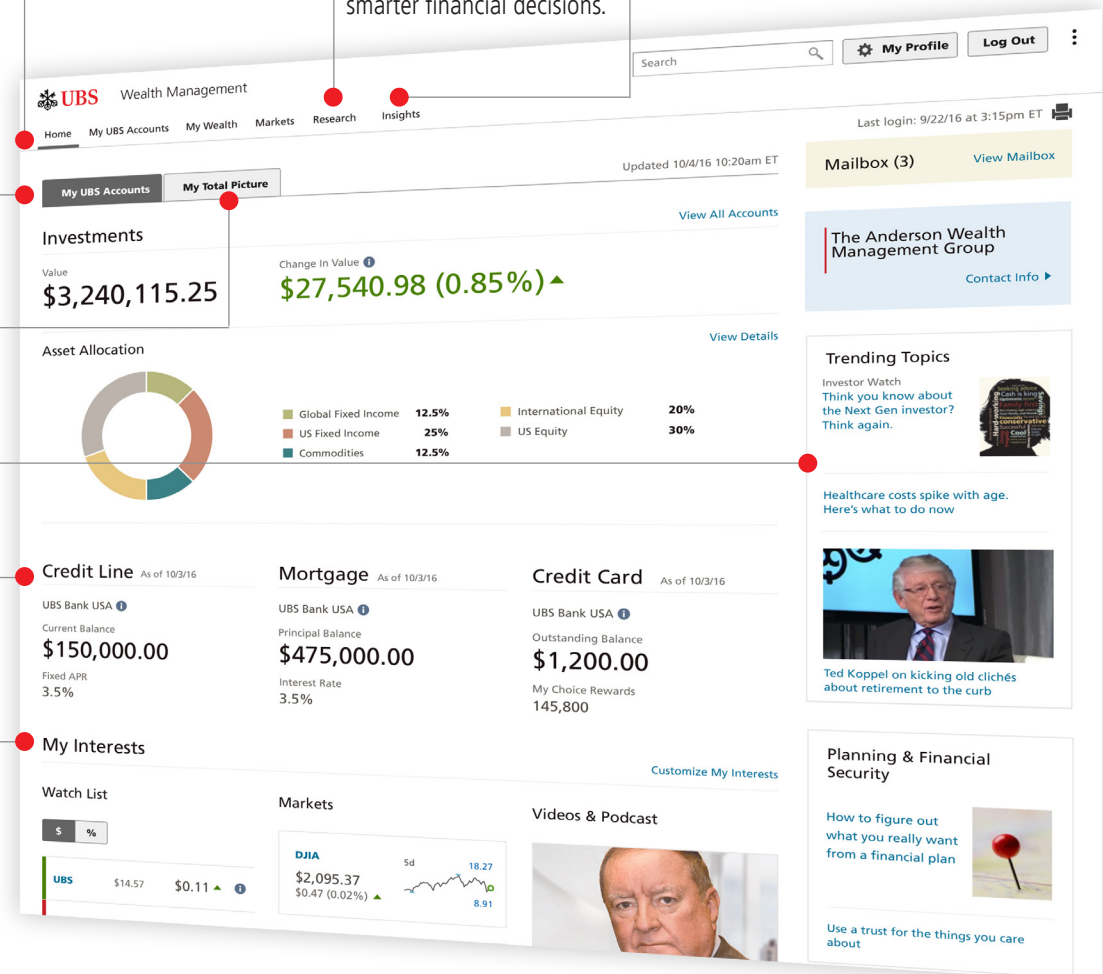
Simple menus to help you steer quickly to the information you want.

Research

Access the latest market intelligence from across UBS to help you make smarter financial decisions.

Insights

Gain knowledge on topics that matter most—retirement, college savings, healthcare and more.



For more information

Contact our dedicated service representatives 24/7.

By phone: Toll free 888-279-3343 from within the U.S.,
from outside the U.S. call collect 201-272-7383

By e-mail: onlineservices@ubs.com

Step 1

To begin using Online Services, go to ubs.com/onlineservices and select **Register Now**.

Welcome to UBS Online Services

Login

User Name

☐ Remember my User Name

Password

Login ⓘ

Forgot your User Name or Password?

Interested in online account access?

Get secure, 24/7 online access to your accounts

Register Now

Need assistance? Call 888-279-3343 or e-mail onlineservices@ubs.com. Outside the U.S., call collect at 201-352-5257.
Lost or stolen card? Call 800-762-1000. Outside the U.S., call collect at 201-352-5257.

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Enter Personal Information

☒ I have a Registration ID ⓘ

Social Security/Tax ID Number
 Don't have a Social Security
(last 4 digits)

Last Name

Account Number
 -
(example XX-01234)

Date of Birth
 / /
(MM/DD/YYYY)

Continue

Enter Personal Information

☒ I have a Registration ID ⓘ

Registration ID

Temporary Password

Account Number
 -
(example XX-01234)

Continue

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Step 2

Enter your information and select **Continue**.

Step 3

To help **protect your account** information from unauthorized access, select how you would like to receive a temporary PIN.



Enter Personal Information

Get Temporary PIN

Enter Temporary PIN

Create User Name & Password

Enroll in e-Delivery

Get Temporary PIN

We will send you a temporary pin to the e-mail or phone number you select below.
Your temporary pin will be valid for 20 minutes.

Send PIN to:

Phone Number	Text Message	Voice Message
(xxx) xxx-0002	<input checked="" type="checkbox"/>	<input type="checkbox"/>
(xxx) xxx-9048	<input type="checkbox"/>	<input type="checkbox"/>

E-mail


e*****@ubs.com	<input type="checkbox"/>
p*****@ubs.com	<input type="checkbox"/>
v*****@gmail.com	<input type="checkbox"/>
v*****@ubs.com	<input type="checkbox"/>
v***3@aol.com	<input type="checkbox"/>

If you need to update your contact information, please contact your Financial Advisor.

[Continue](#) [I already have a PIN](#)

Information and Guidance

Why do I need a temporary password?
What if any of my contact information is missing or inaccurate?
What if my phone number goes to a central extension?
Why can't I see my whole phone number or email address?



Enter Personal Information

Get Temporary PIN

Enter Temporary PIN

Create User Name & Password


Enroll in e-Delivery

Enter Temporary PIN

Enter the temporary PIN below.
The temporary PIN expires 20 minutes after it was requested.

Temporary PIN [I need a new temporary PIN](#)

Remember this computer / device

☐ Yes, register my **private** computer/device 

☐ No, this is **public** computer/device

[Continue](#)

Information and Guidance

What if I did not receive my temporary PIN?

Need assistance? Call 888-279-3343 or e-mail onlineservices@ubs.com. Outside the U.S., call collect at 201-352-5257.
Lost or stolen card? Call 800-762-1000. Outside the U.S., call collect at 201-352-5257.

Step 4

Enter the temporary PIN and select **Continue**.

Step 5

Choose a **User Name**, **Password** and enter e-mail. Accept the UBS Online Services agreement and **Continue**.

Enter Personal Information

Get Temporary PIN

Enter Temporary PIN

Create User Name & Password

Enroll in e-Delivery

Create User Name and Password

Create User Name

(4 to 18 characters with no special characters or spaces)

Enter New Password

(6 to 15 characters with at least 1 letter or number or special characters)

Re-enter New Password

Enter E-mail Address

Re-enter E-mail Address

Activate Financial Software Download (Optional)

☐ Selecting the check box will allow software programs like Quicken to download account information when you enter your Online Services User Name and Password. Select the check box and Continue button below to turn on the service for all your accounts under your Online Services login.

Accept User Agreement

☐ I have read and accept the UBS Online Services agreement

Continue

UBS

Enter Personal Information

Get Temporary PIN

Enter Temporary PIN

Create User Name & Password

Enroll in e-Delivery

Enroll in E-Delivery

In order to reduce your paper mail, select the account(s) and documents you would like enrolled. You will have secure online access to your account documents, and will receive an e-mail notification whenever a new document is available.

Accounts	Statements	Confirmations and notifications	Quarterly Performance Reports	Shareholder communications ¹	Tax Reports
04109	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
04144	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
04184	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
04185	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

¹ Includes prospectuses, annual reports and proxy statements.

Certain notices, such as our annual Privacy Notice, messages about transactions and payments, are delivered electronically with statements.

E-mail address for e-delivery notifications

client@ubs.com

Accept User Agreement

☐ I have read and accept the e-Delivery User Agreement

Finish

Step 6

Enroll in e-Delivery (optional) or select the **Finish** button to gain access to your account.

Credit Lines are securities backed loans provided by UBS Bank USA, an affiliate of UBS Financial Services Inc. Credit Lines are full recourse demand loans, are subject to credit approval and are “margin loans” subject to collateral maintenance requirements (i.e., margin requirements). The lender can (i) demand repayment and/or (ii) change collateral maintenance requirements (i.e., margin requirements) at any time without notice. If the required collateral value is not maintained, the lender can require you to post additional collateral (commonly referred to as a “margin call”), repay part or all of your loan and/or sell your securities. Failure to promptly meet a margin call or repayment or other circumstances (e.g., a rapidly declining market) could cause the lender to liquidate some or all of the collateral supporting the Credit Lines to repay all or a portion of the outstanding Credit Line obligations. Any required liquidations may result in adverse tax consequences. You are personally responsible for repaying the Credit Line in full, regardless of the value of the collateral.

Credit Lines are “non-purpose” loans and may not be used directly or indirectly to purchase, trade or carry securities or to repay debt (a) used to purchase, trade or carry securities or (b) to any affiliate of UBS Bank USA. Additional limitations and availability may vary by state. Prepayments of UBS Fixed Credit Lines will be subject to an administrative fee and may result in a prepayment fee.

Neither UBS Financial Services Inc. nor UBS Bank USA provide legal or tax advice. You should consult your legal and tax advisors regarding the legal and tax implications of borrowing using securities as collateral for a loan. For a full discussion of the risks associated with borrowing using securities as collateral, you should review the Loan Disclosure Statement that will be included in your application package. Securities backed financing involves special risks (including, without limitation, being subject to a margin call if certain collateral value requirements are not met) and is not suitable for everyone.

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The proceeds of a UBS Bank USA loan cannot be used to either purchase, carry or trade in securities or to repay any debt to any affiliate of UBS Mortgage.

The My Total Picture service enables UBS to retrieve information about your non-UBS accounts (“Outside Accounts”) at your direction from the other financial institutions’ websites. The service is provided for your convenience and information only. Unless we agree in writing otherwise, UBS does not provide advice or recommendations with respect to your Outside Accounts and is not responsible for activity or transactions you conduct in your Outside Accounts. UBS does not verify the holdings, valuations or other information we receive about your Outside Accounts. UBS Financial Services Inc.’s SIPC coverage and supplemental SIPC insurance only apply to eligible assets held by UBS Financial Services Inc.

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