

Specialty products. Premier service. A partner who *caters to your unique needs.*



Jumbo mortgages of up to \$10 million

UBS Mortgage offers a range of financing solutions built around your unique needs, along with an experienced team of UBS Mortgage professionals who work with you every step of the way.

UBS Mortgage Premier Pricing—rewarding you for your UBS relationship

UBS Mortgage Premier Pricing, available for jumbo mortgages,¹ offers a discount of up to ½ point off your interest rate based upon your current assets at UBS, plus any new assets you add to your UBS relationship during the loan process.²

UBS Mortgage 1-Month ARM—lower payments and increased liquidity

The UBS Mortgage 1-Month ARM is a 25-year adjustable rate mortgage that resets monthly based upon the prevailing 30-day LIBOR index, which has historically been lower than average fixed and other adjustable mortgage rates. You could potentially reduce your monthly interest payments and thereby maximize your cash flow.

A dedicated Mortgage Specialist focused on your needs

Your dedicated Mortgage Specialist understands your local market and works with you and your Financial Advisor to help find the best mortgage option to complement your overall wealth management strategy.³ And, to help ensure that your mortgage process goes smoothly, UBS Mortgage's Premier Service team works with you from application through closing.

Enhanced features provide flexibility

UBS Mortgage understands the unique needs of high net worth clients. That's why we offer underwriting features like asset dissipation—which assumes an income stream based on your investment assets. And our entity lending feature, which allows you to hold your property title in the name of a legal entity, permits you to borrow without requiring that you alter any of your estate planning or asset protection plans.

You may also consider combining a UBS Mortgage with a UBS Credit Line⁴ as another loan structuring option. By leveraging your eligible assets at UBS, a credit line gives you additional funds that can be used for a bridge loan, land purchase or renovations.

Your unique needs. Our experience and vision.

Contact your UBS Mortgage Specialist today or call 866-LEND-UBS (866-536-3827).


¹ Generally above \$417,000 (or in certain locations, above \$729,500). To qualify for preferred pricing on UBS Bank USA Jumbo and conforming plus loans, clients are required to have a minimum of \$100,000 in assets with UBS.

² New assets must be brought to UBS at least 10 business days prior to closing and must remain at UBS for 12 months after the mortgage closing date. UBS Mortgage Premier Pricing only applies to loans up to \$3MM. For loans over \$3MM consult your Mortgage Specialist.

³ UBS Mortgage Specialists are employees of UBS AG, Tampa Branch. UBS Financial Advisors are employees of UBS Financial Services Inc.

⁴ Credit Lines are nonpurpose securities backed loans provided by UBS Bank USA and are subject to credit approval.

All mortgage products are offered only by UBS Mortgage. All loans are subject to underwriting, credit and property approval. Not all products are available in all states, or for all loan amounts. Other restrictions and limitations may apply. UBS Mortgage currently offers residential mortgage loans within the 50 states of the United States of America and the District of Columbia.

Equal Opportunity Lender. Equal Housing Lender. 

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