



# Planning for Partners in VC, PE and Angel Investors

A deep dive into planning for VC & PE partners and angel investors, focusing on tax mitigation, trust solutions, and best practices

**Hosted by: Presidio Partners**

Warren Coughlin, CFP® Senior Vice President

**Speakers:** Ann Bjerke, Head Advanced Planning  
Advanced Planning Group -UBS

**Tuesday, September 19<sup>th</sup> from 11-11:45am PT**

RSVP to receive a calendar invite

RSVP by Tuesday Sept. 19<sup>th</sup>

Sam Bloom

310-734-0821

[samantha.bloom@ubs.com](mailto:samantha.bloom@ubs.com)



Neither UBS Financial Services Inc. nor its employees (including its Financial Advisors) provide tax or legal advice. You should consult with your legal counsel and/or your accountant or tax professional regarding the legal or tax implications of a particular suggestion, strategy or investment, including any estate planning strategies, before you invest or implement.

Trust services are provided by UBS Trust Company, N.A. or another licensed trust company. UBS Trust Company, N.A. is an affiliate of UBS Financial Services Inc. and a subsidiary of UBS Group AG. Trust investments are not deposits or other obligations of, or guaranteed by, UBS Trust Company, N.A. or UBS Group AG or any of their affiliates. Trust investments involve investment risks, including possible loss of the principal.

Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with plaque design) logo in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.

This presentation is for informational and educational purposes only and should not be relied upon as investment advice or the basis for making any investment decisions. The views and opinions expressed may not be those of UBS Financial Services Inc. UBS Financial Services Inc. does not verify and does not guarantee the accuracy or completeness of the information presented. As a firm providing wealth management services to clients, UBS Financial Services Inc. offers investment advisory services in its capacity as an SEC-registered investment adviser and brokerage services in its capacity as an SEC-registered broker-dealer. Investment advisory services and brokerage services are separate and distinct, differ in material ways and are governed by different laws and separate arrangements. It is important that you understand the ways in which we conduct business, and that you carefully read the agreements and disclosures that we provide to you about the products or services we offer. For more information, please review the client relationship summary provided at [ubs.com/relationshipsummary](https://ubs.com/relationshipsummary), or ask your UBS Financial Advisor for a copy. UBS Financial Services Inc. is a subsidiary of UBS Group AG. Member FINRA/SIPC. Approval date: 9/5/2023 Expiration: 9/30/2024 Review Code: IS2305285

