



Deep Dive Into QSBS (Qualified Small Business Stock)

Join us for a conversation around the intricacies and opportunities of QSBS / Section 1202 for tech founders.

Hosted by: Presidio Partners

Warren Coughlin, CFP®, FA-PWM, Senior Vice President –
Wealth Management

Speaker: Christopher A. Karachale, Partner – Hanson
Bridgett LLP

Wednesday, March 18th from 11am-11:45am PT

Register to Receive Call Link

Natalie Traylor
310-734-2456
natalie.traylor@ubs.com



Presidio Partners
UBS Financial Services Inc.
2000 Avenue of the Stars, 12th Floor South
Los Angeles, CA 90067
[Team Website](#)
310-734-2395

Hanson Bridgett LLP as well as their employees and affiliates are not affiliated with UBS Financial Services Inc. The views expressed herein are those of the speakers and may not necessarily reflect the views of UBS Financial Services Inc.

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 provided. The strategies and/or investments referenced may not be suitable for all investors as the appropriateness of a particular investment or strategy will depend on an investor's individual circumstances and objectives. Investing involves risks and there is always the potential of losing money when you invest.

UBS Financial Services Inc., its affiliates and its employees are not in the business of providing tax or legal advice. Clients should seek advice based upon their particular circumstances from an independent tax advisor.

Certified Financial Planner Board of Standards Center for Financial Planning, Inc. owns and licenses the certification marks CFP®, CERTIFIED FINANCIAL PLANNER®, and CFP® (with plaque design) in the United States to Certified Financial Planner Board of Standards, Inc., which authorizes individuals who successfully complete the organization's initial and ongoing certification requirements to use the certification marks.

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](#), or ask your UBS Financial Advisor for a copy.

