

Change the world. Together.

How UBS Collectives can help you solve the planet's biggest challenges – UBS Collectives



What can one person do?

The world's a big place with complex problems. Even working every hour of every day, one person couldn't hope to solve the planet's challenges alone. But you can still make a big difference. It's how and with whom you do it that makes the difference.

Imagine digging a tunnel by yourself. Not only might it take years, as you dig deeper, the work would get trickier and riskier. Now picture a group of people working together. Each has different tools and skills. Some have shovels, others have excavators. Some are engineers, others, support structure specialists. With everyone working together and playing to their strengths in a coordinated way, the team quickly breaks through to the other side.

That's what happens when you join a collective. In philanthropy, a collective is a network of like-minded people and organizations working together on a cause, such as fighting poverty, climate change, inequality, or inadequate healthcare and education.

The members collaborate and combine their resources and skills towards solving an issue close to their hearts. The result? A united force with the power to make the world a better place.

[How do you join a collective? UBS Collectives makes it easy. So, if you only do one thing today, do this: read on. Because you're about to discover how you can change a problem for good.](#)

My partner and I have both genuinely learned a considerable amount and very much enjoy our time with the rest of the Collective.

UBS Climate Collective member

Changing systems – prevention is better than cure

UBS Collectives isn't about treating the symptoms. It's about changing entire systems to prevent the problems occurring in the first place. And the truth is, we can only achieve this by working together, and uniting our expertise, skills, and resources into one relentless world-changing movement.

The power of collectives – eradicating Polio

Throughout history, polio has paralyzed and taken the lives of countless people. But through a global coordinated vaccination effort, cases have decreased by over 99% since 1988.¹ This was made possible by philanthropists, businesses, governments, and non-profit organizations working together to eradicate the virus. That's the power of collectives.

¹ World Health Organization. "Poliomyelitis: Does polio still exist? Is it curable?" <https://www.who.int/news-room/q-a-detail/does-polio-still-exist-is-it-curable>

Ways to change the world

Three ready-made collectives for you to choose from

UBS Collectives brings you a choice of ready-made collectives focused on issues we're well placed to solve with you. Whichever you choose, you'll be joining a global network of philanthropists, experts and organizations who want to tackle an issue as much as you. By working together and combining your efforts, skills, and resources, you'll achieve more





UBS Accelerate
Collective: investing
in children's health,
education, and the
planet they live in

Every child deserves the opportunity to blossom into a well-rounded, healthy adult – equipped with everything they need to thrive in life. But millions of vulnerable children suffer from a lack of access to quality healthcare, education, and environment. Too often, they face a life spent struggling with poor health, poverty and difficulty finding work. Solutions that work exist, but we need to make them more sustainable. As part of the UBS Accelerate Collective, you'll be working to:

- Improve the health and education of disadvantaged children worldwide and preserve the planet they live on;
- Create a system where innovative 'social finance' investments will soon become the first choice for individuals and organizations seeking to solve social and environmental issues. Social finance is a type of investment that gives a vital financial boost to solutions whilst recycling the returns from investment capital, thereby multiplying the effect of your financial contribution. You'll be helping make social finance mainstream, attracting the massive private and commercial investments needed to give children the healthcare, education, and environment they deserve; and
- Support social businesses – mentoring, training, and investing in social businesses to help them grow, achieve more impact, and take their solutions to the world.



UBS Climate Collective: building coastal resilience

Climate change threatens all life on earth. Unless we act urgently, we'll face an ever-growing threat of environmental catastrophe. Solutions that work exist! And some of these promising solutions lie in the coastal areas, which also happen to be some of the most affected areas. Only by collaborating radically with a razor-sharp focus can we bring them to the scale we need to mitigate the effect of climate change and build resilient livelihoods. As part of the UBS Climate Collective, you'll be working to:

- Support nature-based solutions that reduce and remove carbon emissions from the atmosphere;
- Build blue carbon markets worldwide. Blue carbon markets sell 'credits' in nature-based solutions to governments and businesses seeking to offset their carbon emissions. Their success will promote the rapid growth of nature-based solutions and investments in climate;
- Enable communities to adapt to climate change and create sustainable livelihoods; and
- Protect and restore biodiversity worldwide



UBS Transform Collective: raising children in loving families

The best place for children to grow up is in a family. But despite having families who want to look after them, millions of children live in institutions like orphanages – where they're at more risk of suffering from poor health, education, and prospects. They're also at far greater risk of abuse and trafficking. Solutions that work exist, but they need to be adapted to the local contexts and brought to scale. As part of the UBS Transform Collective, you'll be working to:

- Enable vulnerable children to grow up safely in nurturing families and communities;
- Redirect millions in donations away from institutions and towards quality family-based care systems;
- Reform child protection systems to better protect children and strengthen families; and
- Reduce the number of children living in institutions (currently around five to six million worldwide).¹

¹ The Lancet (2020): "Institutionalisation and deinstitutionalisation of children 2: policy and practice recommendations for global, national and local actors"

Why join our UBS Collectives

Becoming a member of the UBS Collectives gives you the opportunity to embark on a fantastic two-year learning journey with peer philanthropists and experts.

Belong to a network that makes a big difference

Why struggle to achieve your philanthropic goals alone? With UBS Collectives, you'll join a global movement, working with people who share your determination to solve an issue. By collaborating and sharing your resources and skills, you'll create a unified response with the power to change the world. UBS Collectives gives you access to:


- A network of people invited by UBS – people like you who are united in their desire to make a difference
- Fellow philanthropists based locally and worldwide who you can reach out to for ideas and support
- An international team of over 130 philanthropy experts at UBS who can help you get the best from your philanthropy.

Access a learning experience that makes you a better philanthropist

You'll have exclusive access to an unparalleled two-year philanthropy learning experience – bringing you the knowledge, skills, confidence, and peer-camaraderie you need to maximize your impact. Becoming a member of the UBS Collectives provides you with a unique learning curriculum plus advice tailored to your needs including the opportunity to:

- Access and grow expert knowledge on philanthropy – from training on strategic philanthropy, such as how to change systems, learn about best practices in designing, implementing and evaluating projects, and get insights into solving the issue you want to address;
- Improve your practical skills such as selecting partners for collaborations, assessing and vetting projects, and campaigning for change;

- Join an inspirational week-long insights trip (at your own cost) where you'll be able to see system change in action, deepen your expertise, and experience projects in person – and meet and learn from the people running them;
- Join conferences and seminars where you can learn from and advance the conversation with philanthropy experts and peers; and
- Work more closely with a philanthropy advisor to apply these learning to your personal philanthropy.



We are the Climate Collective – a family on a journey together trying to make a difference in the world.

UBS Climate Collective member

Connect with powerful players and magnify your efforts

UBS Collectives connects you to people, organizations and solutions with the power and influence to make your goals reality, including:

- Companies, academics, and specialists who can help maximize your impact;
- Government groups who set laws and policies relating to the issue you want to solve; and
- Opportunities to team up with best-in-class organizations, projects, funds, and social finance solutions that are vetted and approved by UBS. Your donation will be pooled with money from your fellow collective members, creating a combined financial force with the power to make an even greater impact. We'll also add an extra 10% to any amount you donate through the collective

Unite your family around shared values

Experiencing philanthropy with other family members is a great way to bring your family closer together. UBS Collectives unlocks that opportunity, bringing you:

- Quality time with your family, working together on a cause that's close to your heart;
- A dedicated UBS team focused on supporting you and your family; and
- Advice on making the most of your philanthropy and managing other important areas of your family's wealth.

Want to try it out first?

To fit with your needs and lifestyle, each collective brings you a choice of three membership options: Next to a full membership, you can become an advocate or an ally and join the movement with your capacity and access exclusive content and experiences.

	Member	Advocate	Ally
Minimum yearly financial commitment – to be pooled with others and fund the programs on the ground. UBS adds a 10% match.	USD 250k/y (2 years minimum – 500k in total)	USD 50k/y	Up to you
Access to a learning curriculum – with peer philanthropists including:	Two-year curriculum	One-year access	One-year access
Online self-learning	✓	✓	✓ (selected modules only)
Invitation to annual summit	✓	✓ (part of the event)	✗
Online events	✓	✓ (selected events only)	✓ (selected events only)
Personal support from philanthropy advisor to apply the learnings to your philanthropy	✓	✓	✗
Insights trip: One week ‘in-the-field’ learning experience incl. project visit to see systemic impact in action (at your own cost)	✓	✗	✗
Donors’ trip – possibility to join a two-day project visit with a program director (at your own cost)	✓	✓	✗
Reporting – to stay up to date			
Bi-annual progress report	✓	✓	✓
Online live Q&A sessions with experts and partners	✓	✓	✗
Social media assets – to communicate your involvement in the Collective	✓	✓	✓
Family members – option to include additional family members in the UBS Collectives	✓ (one family member included – extra family members for USD 25k per year)	✗	✗

What your peers say...

I came to Ghana with a small idea of what impact was and up until now I gave with my heart. Congratulations to the UBS team because now I'm a convert to my mind coming first. My heart feels the problem. I know that by engaging my head I can make my money go further in addressing problems at scale.

UBS Accelerate Collective member

Rome wasn't built in a day and this carbon issue won't be solved in a day.

UBS Climate Collective member

This trip has restored my hope that there is a real investible pathway to solve problems at scale. I can see it now! Education felt so large and confusing before I came here. Seeing the hands-on work being done and the level of execution makes me very hopeful to reinvent the way we can see philanthropy. It's encouraging to see everyone, including government come together to try and fix the system.

UBS Accelerate Collective member

Seeing it, being here, experiencing it firsthand was really important. It was a game changing day.

UBS Climate Collective member

I came away with a deeper understanding of what we're all trying to achieve and the complexities in doing so. Very motivating.

UBS Transform Collective member

I had a brilliant time. Very insightful and inspiring. Professionally delivered with charm. Thank you for the invitation.

UBS Climate Collective member

It was really helpful for me to learn more. Your help with the learning curve is very much appreciated.

UBS Transform Collective member

Thanks so much for all you did to make last week's UBS Accelerate Collective conference go so well. It was great to spend more time with the UBS team and other members of the collective. We learned a lot during those few days. The conference also challenged us to consider how and where we're investing and donating.

UBS Accelerate Collective member

Where next?

You stand at a crossroads.

One way takes you on a journey of trying to change the world on your own. The other takes you to a network of people and organizations that share your passion for making a difference. It's a place where you can combine your efforts, resources, and skills to create an unstoppable force for good.

Why not come with us? There's so much we can do together.

Take the first step. To find out more and join UBS Collectives, please contact your UBS client advisor.



Visit ubs.com/collectives
to find out more about the UBS Collectives



For more information, please contact:

UBS Business Solutions AG

Social Impact
Postfach
8098 Zürich
Switzerland



Follow us on LinkedIn

ubs.com/philanthropy

These materials have been prepared by UBS Group AG and/or a subsidiary or affiliate thereof, which are altogether referred to below as "UBS." They have not been prepared with regard to any specific investment objectives, financial situation or particular needs of any specific recipient, current client or prospective client. These materials are published solely for informational purposes and are not to be construed as a solicitation or an offer to buy or sell any securities or related financial instruments or services of UBS or to participate in any particular trading strategy endorsed or not endorsed by UBS.

Any recipient of these materials should not consider their contents to be either legal, tax, accounting, regulatory, or other specialist or technical advice or service, or investment advice, or a personal recommendation of any kind, whatsoever. No representation or warranty, either express or implied, is provided in relation to the accuracy, completeness or reliability of the information contained in these materials, nor is any of the information herein intended to be a complete statement or summary of the securities markets or other developments referred to in these materials.

The information in these materials should not be regarded by any recipient as a substitute for the exercise of their own judgment and any opinions expressed in these materials are subject to change without notice and may differ or be contrary to opinions expressed by other business areas or groups of UBS, which may make different assumptions or rely on different criteria. UBS is under no obligation to update or keep current the information contained in these materials. Neither UBS nor any of its directors, officers, employees, or agents accept any liability for any loss or damage arising out of the use of all or part of these materials or reliance upon the information contained therein. These materials are not for distribution or redistribution, except under such circumstances as may be permitted by UBS and or applicable law. UBS specifically prohibits the redistribution or reproduction of these materials in whole or in part, without the written permission of UBS and UBS accepts no liability whatsoever for the actions of third parties in this respect.

© UBS 2023. The key symbol and UBS are among the registered and unregistered trademarks of UBS Group AG. All rights reserved.
Review Code: IS2301941. Expiration: 03/31/2024. 2023-1312452