

Personalize how you view your stock plan information

Managing your stock benefit plan information just became easier in UBS One Source. You'll see several enhancements that give you more control over how your benefit information is displayed online. Even if you logout and close your browser, your preferences will be saved for the next time you log in.¹ These updates will be available on the applicable *Summary* screens if you have stock option plans, stock purchase plans, restricted awards/units, performance awards/units and/or stock appreciation rights.

Enhanced summary screen



The screenshot shows the 'Grants Information' summary screen. It features a table with columns for Grant Number, Grant Date, Expiration Date, Grant Type, Grant Price, Options Granted, Grants Status, Options Unvested, Options Exercisable, Pending Execution, Unvested potential value, Exercisable potential value, and Total potential value. A 'Reset Grouping' button is located in the top right corner. Numbered callouts highlight specific features: 1. A tooltip for the Grant Number column explaining its alphanumeric code. 2. A 'Group By This Field' menu option. 3. 'Sort Ascending' and 'Sort Descending' menu options. 4. A 'Columns' menu with a list of columns and checkboxes for selection. 5. A vertical scrollbar on the right side of the table. 6. The 'Reset Grouping' button.

Grant Number	Grant Date	Expiration Date	Grant Type	Grant Price	Options Granted	Grants Status	Options Unvested	Options Exercisable	Pending Execution	Unvested potential value	Exercisable potential value	Total potential value
000010			ISO	\$23.093800	1,800			0	0	\$0.00	\$0.00	\$0.00
00004072	Dec-22-2000	Dec-22-2010	ISO	\$21.375000	2,100			0	0	\$0.00	\$7,791.60	\$7,791.60
00006798	Sep-21-2001	Sep-21-2011	ISO	\$15.000000	3,000			0	0	\$0.00	\$4,866.75	\$4,866.75
00007452	Oct-17-2002	Oct-17-2012	NQO	\$12.950000	2,500	N/A		0	0	\$0.00	\$2,134.40	\$2,134.40
00011542	Oct-02-2003	Jun-22-2013	NQO	\$19.000000	1,860	N/A		0	0	\$0.00	\$0.00	\$0.00
00012232	Oct-20-2004	Oct-20-2014	NQO	\$24.020000	1,860	N/A		0	0	\$0.00	\$0.00	\$0.00
0000000007614	Jun-13-2008	Oct-17-2012	NQO	\$14.500000	1,200	N/A		0	0	\$0.00	\$6,780.68	\$6,780.68
0000000007486	Jun-13-2008	Oct-20-2014	NQO	\$24.020000	1,860	N/A		0	0	\$0.00	\$0.00	\$0.00
					16,180					\$0.00	\$21,573.43	\$21,573.43

¹ The personalized view that is created for subsequent login sessions will be saved and displayed on the computer used to make changes.

Please see next page for an explanation of each enhancement.

What's new?

- 1 Mouse-over column descriptions.** A description of each column is automatically displayed when you hover over the column with your cursor.
- 2 Column grouping.** Select "Group By This Field" by clicking a drop-down arrow within each column to group your awards/grants by the values in that column.
- 3 Column sorting.** Choosing a specific column allows you to sort your awards/grants by ascending or descending order.
- 4 Column ordering.** You can move columns to customize your page view by clicking and dragging them to a new location. You can also add or remove selected columns as needed by selecting the checkboxes that are displayed.
- 5 Column headings.** If the awards/grants displayed exceed the number of viewable rows, you will be able to scroll through your awards/grants without losing the column headings or total values.
- 6 Undo grouping.** To ungroup columns and revert back to the standard view, click the "Reset Grouping" button.

Resources

For more information about these and future enhancements scheduled for UBS One Source, please call the UBS Customer Service Center number located in the "Contact Us" section of UBS One Source.

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