# MAP ‘OVERTIME ELITE’ WEALTH ADVICE CENTER FELLOWSHIP

MAP x UBS PROPOSED CASE STUDY

### BACKGROUND

The UBS Wealth Advice Center (WAC) is a growing network of over 300 financial advisors, relationship managers, and client service associates. Together, they provide personalized, digital-led, and advisor-driven solutions for more than 200,000 households. Clients rely on UBS to deliver holistic wealth management solutions that touch every aspect of their financial lives, from long-term planning and investment strategies to liquidity management and legacy building.

As UBS continues to expand its Wealth Advice Center, its mission is clear: **to offer clients a convenient, customizable experience that balances digital flexibility with trusted, personal guidance from advisors.**

The WAC model emphasizes:

* A blend of technology and human expertise.
* Advisor-led solutions tailored to unique client needs.
* A scalable, skills-based training model to prepare the next generation of financial advisors.

UBS’s future success depends on its ability to **attract and retain high-net-worth households**, deliver **flexible but consistent client experiences**, and create **personalized strategies that build long-term trust and value.**

### BUSINESS SITUATION

UBS recently launched new initiatives to improve its wealth management offering, with a focus on **customizable digital experiences** and **advisor-driven solutions**. However, the firm has recognized two emerging challenges:

1. **Client Segmentation & Personalization**

Many of UBS’s 200,000+ households vary widely in financial sophistication, goals, and digital engagement preferences. Some prefer fully digital dashboards and self-directed control, while others seek frequent advisor interaction and personal guidance. Balancing this range of preferences while maintaining consistency in service is a key strategic priority.

2. **Expanding Market of “Next-Generation” Investors**

A growing portion of UBS’s prospective clients are younger professionals and high-earning athletes with investable assets of $250K+. These clients often prioritize flexibility, digital convenience, and values-based investing (sustainability, social impact, etc.). UBS must ensure that its Wealth Advice Center can **win loyalty among this demographic** without alienating its traditional high-net-worth client base.

### PROBLEM STATEMENT

UBS leadership has tasked your Wealth Advice Center analyst team with developing a set of **customized wealth management strategies** that demonstrate how UBS can:

1. **Deliver a flexible and customizable client experience** that blends technology and advisor expertise.
2. **Strengthen relationships with emerging investor segments**, such as young professionals and athletes with significant investable assets.
3. **Design scalable, advisor-led solutions** that can be applied consistently across UBS’s 200,000+ client households, while still feeling personalized.

Your team has **two months** to develop and present your recommendations. You are expected to propose **five innovative wealth management solutions**, showing both the **investment strategy** and the **client engagement approach** (digital tools, advisor role, relationship-building).

Your final presentation should clearly address:

* How your solutions reflect UBS’s mission of convenient, customizable client experiences.
* How UBS can strengthen loyalty among next-generation investors while continuing to serve its existing base.
* How your recommendations can be realistically scaled across the WAC model.

### DISTRIBUTION OF WORK

Teams will be organized into groups of **five**, adhering to a workflow that accurately reflects the operations of a quantitative finance desk: idea generation → modeling → testing → risk assessment → integration → reporting. Each student will receive a distinct "slice" of the project to guarantee a fair and equitable distribution of responsibilities.

1. Initiation Phase (Defining Scope & Direction)
2. Planning Phase (Structuring the Work)
3. Execution Phase (Building & Backtesting)
4. Control Phase (Risk Management & Adjustments)
5. Monitoring Phase (Ongoing Oversight & Alignment)

### “FINAL FOUR” DELIVERABLES

1. **Final Slide Deck**: A professional PowerPoint presentation (10–12 slides) that outlines the opportunity, model design, results, risks, and the client integration strategy.
2. **One-Page Fact Sheet**: An executive summary of the strategy, highlighting its objectives, key metrics, and performance achievements.
3. **Impact Statement**: A 1–2 paragraph reflection on how the strategy enhances the UBS team’s ability to strengthen client relationships and maintain competitiveness.
4. **Final Management Presentation**: Students will present their final presentation to UBS virtually on **Monday, December 8th.** This presentation will serve as their capstone project and will conclude their fellowship.