Product description

Fund self-service

With fund self-service, you use the PostFinance infrastructure. Invest your money independently in selected funds according to your own wishes.

At a glance	
You are investing independently according to your own wishes and do not need any advice.	
	Advice and services ● ○ ○ ○ ○
	Individual investment strategy ○ ○ ○ ○ ○
	Ongoing portfolio monitoring —
	Access to market view ✓

Your investment needs

You are an investment expert and want to invest in funds independently. You do not need any advice from PostFinance.

The advantages for you

- You will benefit from a straightforward range of funds put together by our experts. This consists exclusively of PostFinance Fonds and selected third-party funds.
- Amongst our third-party funds, you will be able to choose from funds that focus on various countries, sectors and themes, including technology and sustainability.
- With a funds saving plan, you can invest small amounts of money into selected funds on a regular basis.
- You receive your e-tax statement “electronically” in e-finance or by post, free of charge. This allows you to import the relevant data with ease into your cantonal tax authority’s tax declaration software or to transfer it manually.

An overview of the most important services

Advice and services	
Processing of transactions and custody account management	✓
Custody account statement	Semi-annually
E-tax statement (Switzerland)	✓
Funds saving plan	✓
Fund withdrawal plan	✓

Our market view	
Access to market analyses	✓

Purchase and usage channels	
Online[1] and in branch	✓

[1] An e-finance login is required for the online channel.

Prices and conditions

Fees [2]	Information on the fees can be found in the price list for investment solutions at postfinance.ch/investment-information.
Sales remuneration	Yes, already included in the fund costs for the individual instruments *(see Fact-sheet: costs and sales remuneration in the "Fund self-service" and "Fund consulting basic" investment solutions* at postfinance.ch/investment-information).
Minimum amount per fund (purchase or redemption [3])	CHF 100
Minimum amount for recurring investment via funds saving plan	CHF 20
Securities deliveries to third-party banks	Not possible for PostFinance Fonds

[2] Debited from the reference account.
[3] Redemption also possible via fund withdrawal plan.

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You can find our range of funds at postfinance.ch/fundrange.
More information about the range can be found at postfinance.ch/funds.

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