

## 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



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<sup>1</sup> and in branch ✓

<sup>1</sup> An e-finance login is required for the online channel.

## Prices and conditions

Fees <sup>2</sup>	Information on the fees can be found in the price list for investment solutions at <a href="https://postfinance.ch/investment-information">postfinance.ch/investment-information</a> .
Sales remuneration	Yes, already included in the fund costs for the individual instruments (see <i>Factsheet: costs and sales remuneration in the "Fund self-service" and "Fund consulting basic" investment solutions</i> at <a href="https://postfinance.ch/investment-information">postfinance.ch/investment-information</a> ).
Minimum amount per fund (initial investment)	CHF 2,000
Minimum amount per fund (follow-up investment or redemption <sup>3</sup> )	CHF 100
Minimum amount for recurring investment via funds saving plan	CHF 20
Securities deliveries to third-party banks	Not possible for PostFinance Fonds

<sup>2</sup> Debited from the reference account.

<sup>3</sup> Redemption also possible via fund withdrawal plan.

### Disclaimer

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You can find our range of funds at [postfinance.ch/fundrange](https://postfinance.ch/fundrange).  
More information about the range can be found at [postfinance.ch/funds](https://postfinance.ch/funds).

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