

Product description

E-asset management

With e-asset management, you can sit back and relax. Our investment experts make investment decisions for you and keep an eye on the financial markets.

At a glance

You delegate, we deliver.



Advice and services



Individual investment strategy



Portfolio monitoring



Access to house view



Your investment needs

You want to leave the management of your assets to the investment experts at PostFinance and devote your time to other things.

The advantages for you

- Our investment experts put together your portfolio in accordance with your chosen investment strategy.
- We follow the financial markets actively and ensure that your assets are optimally invested in line with your investment strategy. Your portfolio will therefore be monitored by our investment experts on an on-going basis and regularly adapted to market developments based on PostFinance's market view.
- We invest on your behalf in an attractive range consisting exclusively of selected third-party funds and exchange traded funds.
- You set your own personal priorities and choose an investment focus area according to your interests: Swiss, Global or Responsible.
- If you want to increase your investment amount, you can easily choose between a one-time transfer and a standing transfer order. A standing transfer order enables you to invest your chosen amount automatically and regularly, and you can benefit from average prices.
- You receive your e-tax statement "electronically" in e-finance, free of charge, which allows you to import the relevant data with ease into your cantonal tax authority's tax declaration software.

An overview of the most important services

Advice and services

Access to portfolio-related advice	✓
Processing of transactions ¹ and custody account management	✓
Online performance overview	✓
Asset statement	Quarterly
E-tax statement (Switzerland)	✓

Individual investment strategy

Joint definition of your investment strategy	✓
Choice of investment focus (Switzerland, Global or Responsible)	✓

Portfolio monitoring

Continuous review of your investments in line with your investment strategy	✓
Reallocation of your portfolio in line with your investment strategy	✓

Our house view

Access to market analyses	✓
Basis for the positioning of your portfolio	✓

Purchase and usage channels²

Online and in branch ³	✓
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¹ To ensure verification of the portfolio, we cannot accept any new orders while orders remain pending in your custody account.

² Additional legal information is provided on page 2.

³ An e-finance login is required for the online channel and in branches.

Prices and conditions

Fees ⁴	Information on the fees can be found in the price list for investment solutions at postfinance.ch/investment-information .
Sales remuneration	Only funds without sales remuneration are used in e-asset management.
Minimum amount	CHF 5,000 when opening and making redemptions from existing e-asset management.
Minimum amount (follow-up investment)	From CHF 0 as a one-time transfer or via the "standing transfer order" function as a saving plan. Investment amounts of up to CHF 500 are generally invested as part of the next rebalancing.
Redemptions	Possible from CHF 500. The minimum investment amount of CHF 5,000 must remain in e-asset management after redemption. This means redemptions can be made in e-asset management from investments of CHF 5,500 or more.
Securities delivery to third-party banks	Not possible

⁴ Debited from the investment account.

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More information about this product can be found at postfinance.ch/assetmanagement

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