PostFinance

Product description

Investment consulting plus

As part of the investment consulting plus package, you will receive personalized, ongoing and comprehensive advice, which will enable you to make informed investment decisions.

At a glance	
You make the investment decisions, we give you the advice.	
	Advice and services ●●●●●
	Individual investment strategy ●●●●●
	Portfolio monitoring ●●●●●
	Access to market view ✓

Your investment needs

You want to keep up to date with market changes and want your customer advisor to provide proactive support in your investment decisions.

The advantages for you

- You benefit from the support of your personal investment advisor, who provides you with investment proposals in line with your chosen investment strategy, which you can also tailor to your needs.
- If there is any deviation from your chosen investment strategy, you will be notified automatically on the following day so that you can update your portfolio directly.
- We offer you an attractive range of investment opportunities 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: Switzerland, Global or Responsible.
- 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	✓
Personal investment advisor	✓
Investment proposal upon subscription	✓
Regular individual investment and reallocation proposals	✓
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	✓
Automatic notifications for strategy deviations	✓

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

Purchase and usage channels[2]	
Online and in branch[3]	✓

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.

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 investment consulting plus.
Minimum investment amount (initial investment)	CHF 80,000 (recommended amount[5])
Minimum amount (follow-up investment or redemption)	From CHF 0
Securities deliveries to third-party banks	Not currently possible

[4] Debited from the investment account.
[5] Technically possible from CHF 5,000.

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

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