

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.

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 ongoing basis and regularly adapted to market developments based on PostFinance's house 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 Sustainability.

An overview of the most important services

Advice and services	
Access to advice	✓
Processing of transactions ¹ and custody account management	✓
Online performance overview	✓
Asset statement	Quarterly
Swiss tax statement	✓
Individual investment strategy	
Joint definition of your investment strategy	✓
Choice of investment focus (Switzerland, Global or Sustainability)	✓
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 channels ²	
Online and in branch ³	✓

At a glance

"You delegate, we deliver."

	Advice and services	
	Individual investment strategy	
	Portfolio monitoring	
	Access to house view	

Prices and conditions

Service fees ^{4,5}	0.75% p.a. on average amount of invested assets including investment account. Transaction fees, other price positions and 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 (initial investment or redemption)	CHF 5,000
Minimum amount (follow-up investment)	From CHF 0
Securities delivery to third-party banks	Not possible

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.

⁴ Debited from the investment account.

⁵ Plus VAT on 65% of the amount; the remaining 35% is not subject to VAT.

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

Note

Partner portfolios and/or partner custody accounts are not currently available (deviation from section 6 of the custody account subscriber conditions). Existing and future powers of attorney can currently be considered and accepted only to a limited extent. In particular, authorized persons do not have electronic access to e-asset management in e-finance. They can, however, obtain information and issue written notices of termination.

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All investment services and financial instruments provided by PostFinance Ltd are unavailable to US persons and other persons whose domicile or tax liability is outside of Switzerland and will therefore neither be offered nor sold/provided to them.

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