















# Wealth Concierge Service Scope Overview

Our **Wealth Concierge** acts as your first point of contact to meet your routine administrative needs. The team consists of UK certified experts who handle all inquiries with respect to your banking relationship. Services executed by the Wealth Concierge include but are not limited to:

Data modifications	Account	Payment transactions	Cards	Digital Banking	Stock Market	Custody account	Miscellaneous	Legal entities
Tax statement	Vested benefits account (2 pillar): enquiries	Block banker's check	General	 Access App / E-docs set up	 Direct Investments	Order form general meeting	 Cash orders	General information
Valuation of assets	Close account	 Change / delete standing order	Cancellation Debit & Customer Card	Unblock Digital Banking contract	Precious metals	Custody account instructions	CIO Subscriptions	Stock market orders
 Delete power of attorney	Block account	 Account transfer	Unblock Debit, Credit & Customer Card	Find or delete a pending order / check payment order status	 Collective investments		 Corporate actions	
	 Send account statement	Change / delete direct debit	Block card/order replacement/change limit Debit, Credit & Customer Card	 Navigational Help / Live Help Connection	Open securities valor		Form orders	
	Withdrawal arrangement	Set up new direct debit	 Order PIN	Digital Agent / Video Identification Booking	FX transaction standard		Handling with group of persons with right to information	
		Swift message	 Invoice Copy / transfer from account to card - Credit Card		FX forward t+0 / t+1 / t+2+ (without SWAP)		Meeting scheduling with Client Advisor	
		 Payments within Switzerland <150k CHF and International < 20k						

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