

Any reference to Credit Suisse (Switzerland) Ltd. is to be considered as reference to UBS Switzerland AG after the merger between the two companies.

Invest

Credit Suisse Invest Partner



The investment solution for demanding investors

Thanks to our flexible investment solutions, you choose the scope of advice, portfolio monitoring, and investment proposals according to your personal needs. In all cases, you can count on our global financial expertise.

With the Partner investment solution, you can identify investment opportunities at any time without ever losing sight of the risks. A comprehensive report and regular portfolio quality alerts help you to identify opportunities and risks in your portfolio and to make the necessary adjustments at an early stage. You are in regular contact with your personal advisor, who supports you in all investment-related inquiries and is your central point of contact for all your financial concerns.

You also receive detailed insight into investment opportunities and trends thanks to research publications and analyses of market developments by our global experts.

You maintain an overview of your investments thanks to our comprehensive online banking as well as transparent reports on the performance of your investments, issued quarterly.

The Partner investment solution includes an annual tax statement. In addition to thorough analysis and long-term optimization of your assets, you have access to financial planning at a preferential price.

Your needs

- A central point of contact
- Active advice and support for optimizing your portfolio and benefiting from market opportunities
- Ongoing monitoring of your portfolio
- Notifications in the event of portfolio issues

How you benefit

- A personal advisor as a central point of contact for all of your financial questions
- Comprehensive quarterly portfolio quality reports highlighting key developments and potential issues in your portfolio
- Portfolio quality alerts to enable an immediate response to potential risks
- At least one annual discussion of investment strategy
- Regular tips on current investment opportunities
- Research publications with market appraisals and analyses

Risks you face

- An advisory agreement provides no guarantee of positive returns.
- According to the advisory agreement, the client retains responsibility for investment decisions.
- For information on the risks of individual investment instruments, please refer to the product documentation.

Tax treatment depends on the individual circumstances of each client and may vary accordingly.

Contact

Your advisor will be happy to arrange a personal consultation with you. Call us at 0844 844 007*
[credit-suisse.com/invest](https://www.credit-suisse.com/invest)

* Please note that telephone calls to our numbers may be recorded. We assume that, by calling us, you give your consent to this business practice.

Services of Credit Suisse Invest Partner

Support and interaction

Personal advisor	✓
Strategic advisory meeting	1 × per year
Sophisticated and comprehensive advisory process	✓
Investment strategies based on individual needs, risk preferences, and risk profile	✓
Suitability test (e.g. evaluation of whether products are suitable for your risk tolerance)	✓
Access to additional product experts	✓
Financial planning at a preferential price	✓

Monitoring and reporting

Portfolio monitoring

Portfolio review: daily assessment of portfolio quality (available online)	✓
Portfolio quality report (analysis of portfolio quality based on multiple factors)	4 × per year
Portfolio quality alerts via text message, email, or letter	Ongoing
Alerts when the price of stocks in your safekeeping account changes significantly (credit-suisse.com/company/alerts)	✓

Performance reporting

Standard Investment Report: comprehensive information about all investments and their development	4 × per year
Online overview of the performance of your investments (choice of different time horizons)	✓
Impact simulation of historic market events on the investment portfolio performance	✓
Tax statement	✓

Ideas and services

Investment ideas, trends, and market developments

Publications: "Investment Monthly," "Partner Newsletter"	✓
Access to strategic investment ideas via personal advisor	✓
Portfolio review with customized trading recommendations for portfolio optimization	Multiple times per year (as needed)
Chief Investment Officer points of view and video on market developments	✓
Event-based telephone conferences	✓
Invitations to exclusive investment-related events	✓

Online offering and online trading

Comprehensive and secure online banking: overview of all your assets	✓
Functions on portfolio monitoring via online banking	✓
Efficient platform for fast and secure trading on more than 60 stock exchanges worldwide	✓
Prompt implementation of client instructions and corporate actions (e.g. capital increase, stock split)	✓

Pricing and transparency

Simple and transparent pricing	✓
Attractive transaction fees	✓
Access to retrocession-free investment funds	✓

For pricing details, please refer to the pricing overview.

CREDIT SUISSE (Switzerland) Ltd.,
part of UBS Group
P.O. Box
CH-8070 Zurich
credit-suisse.com/invest

The information provided herein constitutes marketing material. It is not investment advice or otherwise based on a consideration of the personal circumstances of the addressee nor is it the result of objective or independent research. The information provided herein is not legally binding and it does not constitute an offer or invitation to enter into any type of financial transaction. The information provided herein was produced by Credit Suisse AG and/or its affiliates (hereafter "CS") with the greatest of care and to the best of its knowledge and belief. The information and views expressed herein are those of CS at the time of writing and are subject to change at any time without notice. They are derived from sources believed to be reliable. CS provides no guarantee with regard to the content and completeness of the information and where legally possible does not accept any liability for losses that might arise from making use of the information. If nothing is indicated to the contrary, all figures are unaudited. The information provided herein is for the exclusive use of the recipient. Neither this information nor any copy thereof may be sent, taken into or distributed in the United States or to any U. S. person (within the meaning of Regulation S under the US Securities Act of 1933, as amended). It may not be reproduced, either in part or in full, without the written permission of CS.
Copyright © 2024 CREDIT SUISSE. All rights reserved.