

# Step-by-step instructions for 3a online opening



# Are you ready?

**This brochure will show you the function “Open a Pillar 3a” in your mobile banking (Credit Suisse – CSX app) and on the desktop.**

For you to be able to open a Pillar 3a online, you must have the following:

- Credit Suisse online banking
- Existing banking or Pillar 3a product

## Contents

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### Mobile

**Open Pillar 3a online 03**

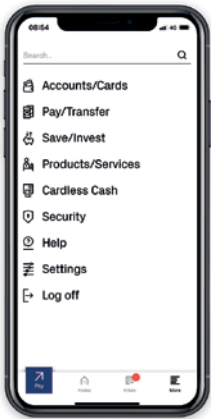
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### Desktop

**Open Pillar 3a online 06**

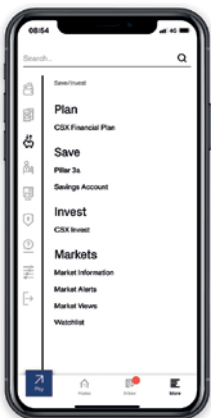
# Mobile

## Open Pillar 3a online (1/3)



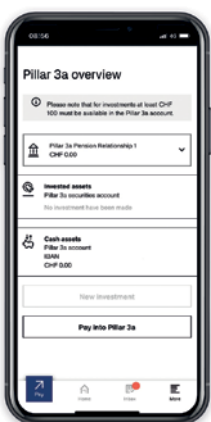
### 01

- Open the Credit Suisse – CSX application and log in to online banking.
- Click on **“More”** and select **“Save/Invest.”**



### 02

- Select **“Pillar 3a.”**

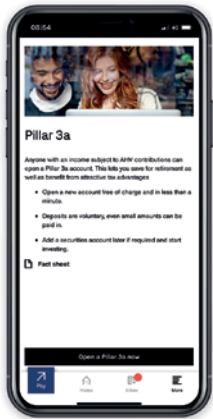


### 03

- If you already have pension relationships with CREDIT SUISSE PRIVILEGIA Pillar 3 pension foundation, select **“+ Open new pension relationship”** at the very bottom of the selection menu. Otherwise, please proceed with step 04.

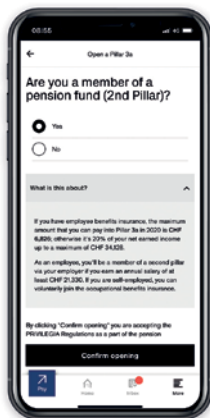
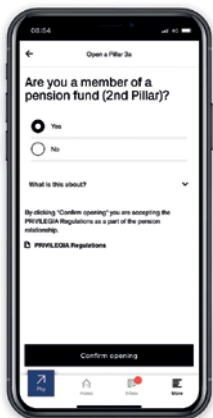
# Mobile

## Open Pillar 3a online (2/3)



### 04

- Select **“Open a Pillar 3a now.”**



### 05

- Answer the question about association to a pension fund by selecting **“Yes”** or **“No.”** You can find more information in the drop-down menu.
- By clicking on **“Confirm opening,”** you accept the PRIVILEGIA regulations provided thereby and open your Pillar 3a.

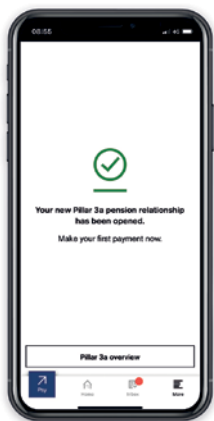


### 06

- A progress bar fills out in three steps until successful opening.

# Mobile

## Open Pillar 3a online (3/3)

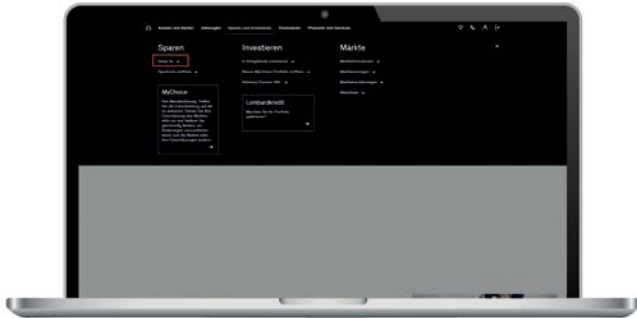


## 07

- Your Pillar 3a account was successfully opened.
- Select **"Pillar 3a overview"** in order to access the Pillar 3a overview page. Your new pension relationship is preselected and the new IBAN is directly visible.
- If necessary, you can now proceed with the deposit via "Account transfer" and then, via "New investment," you can open and invest in a Pillar 3a safekeeping account. For this, see the separate "Step-by-step instructions for 3a online Mixta trading."

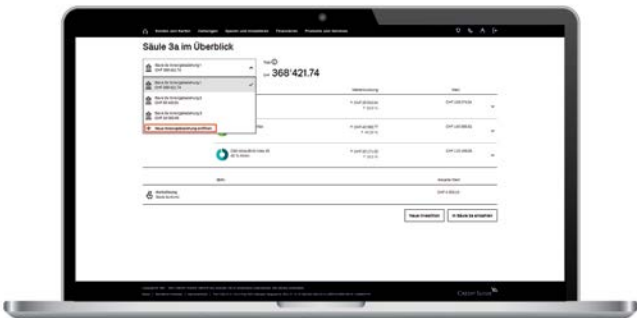
# Desktop

## Open Pillar 3a online (1/3)



### 01

- Log on to [Credit Suisse Direct](#).
- Click on **“Save and Invest”** in the navigation bar and select **“Pillar 3a”**.



### 02

- If you already have pension relationships with CREDIT SUISSE PRIVILEGIA Pillar 3 pension foundation, select **“+ Open new pension relationship”** at the very bottom of the selection menu. Otherwise, please proceed with step 03.

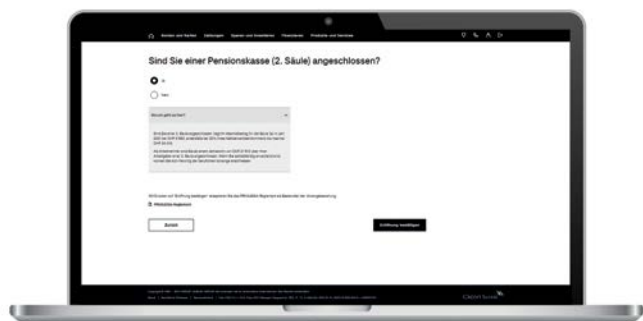


### 03

- Select **“Open a Pillar 3a now”**.

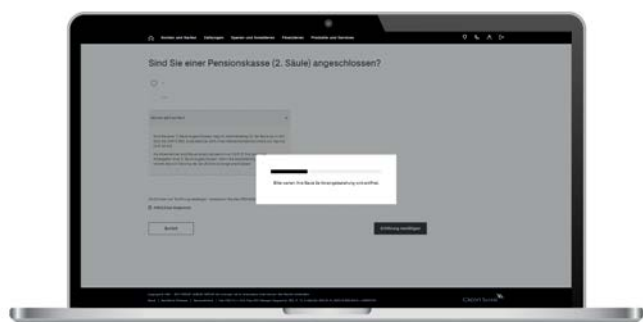
# Desktop

## Open Pillar 3a online (2/3)



### 04

- Answer the question about association to a pension fund by selecting **“Yes”** or **“No”**. You can find more information in the drop-down menu.
- By clicking on **“Confirm opening”**, you accept the PRIVILEGIA regulations provided thereby and open your Pillar 3a.

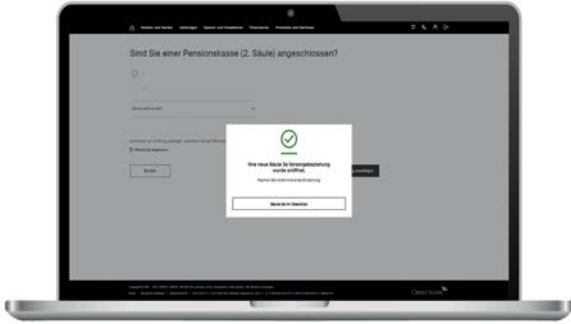


### 05

- A progress bar fills out in three steps until successful opening.

# Desktop

## Open Pillar 3a online (3/3)



# 06

- Your Pillar 3a account was successfully opened.
- Select **“Pillar 3a overview”** in order to access the Pillar 3a overview page. Your new pension relationship is preselected and the new IBAN is directly visible.
- If necessary, you can now proceed with the deposit via “Account transfer” and then, via “New investment,” you can open and invest in a Pillar 3a safekeeping account. For this, see the separate “Step-by-step instructions for 3a online Mixta trading.”



### Contact us

We will be happy to arrange a personal consultation.  
Call us at +41 844 200 114\*; Mon.– Fri., 08:00–20:00.  
Visit our website for more information: [credit-suisse.com/pensions](https://www.credit-suisse.com/pensions).

\* Please note that telephone calls to these numbers may be recorded. We assume that, by calling us, you accept this business practice.





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