

Purchasing and managing a Pillar 3a securities solution (2/5)



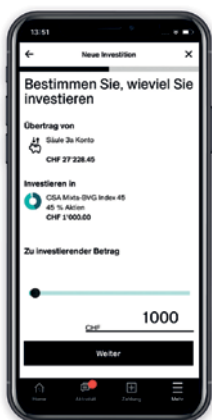
04

- You can switch between the two investment group categories by clicking on **“Actively managed”** and **“Indexed.”**
- Select an actively managed or indexed securities solution.



05

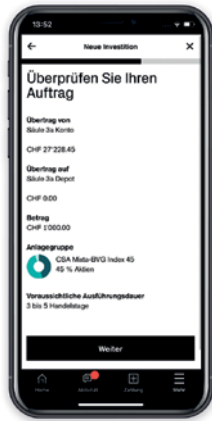
- Further details will be displayed about the securities solution (e.g. potential risk/reward ratio, investment horizon, fact sheet). Then click on **“Select.”**



06

- Now decide how much you would like to invest and click on **“Next.”** You can either enter the amount manually or select it by moving the slider.
- The maximum you can invest is the amount that you have already paid into your Pillar 3a account.

Purchasing and managing a Pillar 3a securities solution (3/5)



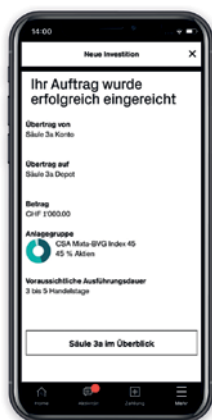
07

- Here you will see the estimated time to process the purchase. Check the details and click on **“Next.”**



08

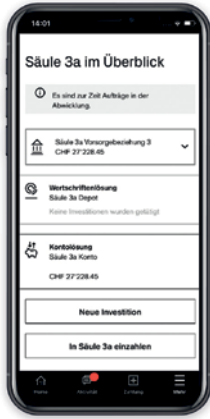
- To complete the order, read and accept the conditions and contractual terms and click on **“Submit order.”**



09

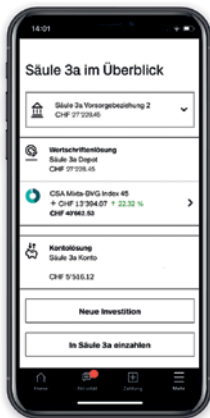
- Your order has been successfully submitted to Credit Suisse.
- Click on **“Pillar 3a overview”** to return to your personal Pillar 3a overview page.

Purchasing and managing a Pillar 3a securities solution (4/5)



10

- If you return to the Pillar 3a overview page after submitting the order, the message “Orders are currently being processed” appears.



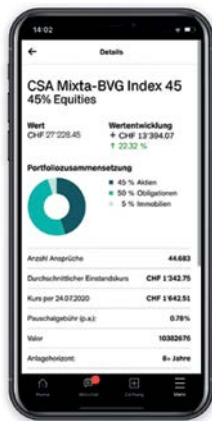
11

- Once the order has been executed, the securities solution will appear on the Pillar 3a overview page.

Mobile

Purchasing and managing a Pillar 3a securities solution (5/5)

You have now completed the process. If you wish to manage your Pillar 3a securities solutions or change your investment group in the future, you can simply follow the process below:



12

- You can manage your existing investment groups on the Pillar 3a overview page. Click on an investment group to see further details.
- The following three functions are available:
 - “**Sell**”: Sell an existing investment group.
 - “**Switch**”: Switch from an existing investment group to another group.
 - “**Invest more**”: Invest more funds in an existing investment group.
- You can add further investment groups by clicking on “**New investment.**”



Contact us

We will be happy to arrange a personal consultation.
Call us at 0844 200 114*; Mon.– Fri., 8:00 a.m. – 8:00 p.m.
Visit our website for more information: 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.



CREDIT SUISSE (Switzerland) Ltd.

P.O. Box 100

CH-8070 Zurich

[credit-suisse.com](https://www.credit-suisse.com)

Copyright © 2020 Credit Suisse Group AG and/or its affiliates. All rights reserved.