

The Investment Fund Income Plan

Benefit from your assets for longer

What you need to know about the Investment Fund Income Plan

You've achieved a savings target, and now you'd like to benefit from your capital for as long as possible. The investment fund income plan from Credit Suisse offers you a comfortable way of doing just that.



The principle of the investment fund income plan is simple

- You make an initial investment in the fund and choose an amount that you would like to withdraw on a regular basis.
- The remaining capital stays invested in your fund, providing a long-term basis for additional returns.
- Your assets can grow, enabling you to draw on your savings for a longer period.
- With the investment fund income plan, you can also take advantage of solutions that match your personal investment strategy. You have a range of Credit Suisse funds to choose from.
- You can also invest in different markets and currencies in a dissaving situation.

Take the first step toward enjoying your assets

If you have already invested your assets in selected Credit Suisse investment funds¹, you can simply transfer these assets to an investment fund income plan. If you do not yet own any investment funds, you can open your investment fund income plan by making your initial investment in cash.

Your benefits

- Systematic, regular payouts while maintaining attractive earnings potential over the long term
- Additional issue and redemption of fund units at any time free of charge

1 In accordance with the "Selected investment fund savings and income plans."

Risks

Investment funds are simple, proven, versatile instruments. However, they also involve certain risks. Credit Suisse is glad to provide its expertise to help you make investment decisions that minimize these risks.

- **Market risk:** With investment funds, you invest in various financial markets and are exposed to price fluctuations on these markets.
- **Currency risk:** Investing in a variety of financial markets can carry currency risks.
- **Low influence:** Investment decisions within the fund are made by the fund management team and cannot be influenced.

Investment Fund Income Plan at a glance

Initial investment	Minimum of CHF 100 (or EUR/USD 125)	
Payment amount	Minimum of CHF 100 (or EUR/USD 125) per period to your personal account at Credit Suisse	
Frequency	Monthly, every two months, quarterly, every six months, yearly	
Costs	■ Safekeeping fees depend on the safekeeping account value in CHF (or foreign currency equivalent) ¹	
	Safekeeping account value in CHF (equivalent value in foreign currency)	Fee in % p. a.
	Up to 1 million	0.25%
	From 1 million up to and including 3 million	0.20%
	From 3 million up to and including 10 million	0.15%
	Over 10 million	0.10%
Management fees	■ No minimum per position/security	
	Dependent on the fund	
	Allowed at any time free of charge of fund units	
	1 Plus value-added tax (VAT), at the applicable normal rate, for clients resident in Switzerland and the Principality of Liechtenstein. Clients resident abroad do not pay value-added tax (VAT). The safekeeping account fee is calculated on a monthly basis in CHF and levied in the reference currency – generally at the end of a quarter.	

Contact us

We will be happy to arrange a personal consultation.

Call us at 0848 880 844*

For more information, visit our website at:

credit-suisse.com/investmentfunds

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CREDIT SUISSE (Switzerland) Ltd.

P.O. Box
CH-8070 Zurich
credit-suisse.com

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