

Credit Suisse Invest Mandate



The wealth management solution for busy 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 Mandate investment solution, you decide on the appropriate investment strategy and delegate the management of your assets to a team of investment experts. You retain control over your assets at all times: Details of the development of your portfolio are communicated to you in regular, transparent, and easy-to-understand reports. Your personal advisor is your central point of contact for a comprehensive approach to your financial concerns.

You choose from a set of flexible investment strategies based on your risk profile and investment objective. The execution follows a clear and structured investment process with constant portfolio monitoring that ensures disciplined implementation of your selected strategy.

A global team of investment experts dynamically takes advantage of short-, medium-, and long-term market opportunities for you, ensuring that investment opportunities are taken as they arise and that risks are minimized.

The Mandate 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

- Choice of individual investment strategy and its implementation by asset management experts
- A clearly structured and transparent investment process
- Ongoing monitoring of your portfolio
- Control over the development of your assets

How you benefit

- A personal advisor as a central point of contact for all of your financial questions
- Flexible investment strategies based on your personal preferences
- Access to the vast expertise of Credit Suisse in the field of asset management
- Constant monitoring and optimization of your portfolio
- At least one annual discussion of investment strategy
- Transparent reports on portfolio performance

Risks you face

- Asset management provides no guarantee of positive returns.
- The return depends on the selected asset classes and correct market assessment.
- For information on the risks of individual investment instruments, please refer to the product documentation.

Contact

Your advisor will be happy to arrange a personal consultation with you. Call us at 0844 844 007*, Monday – Friday, 8:00 a.m. – 8:00 p.m.
[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 Mandate

Support and interaction

Personal advisor	✓
Portfolio manager	✓
Strategic advisory meeting	1 × per year
Sophisticated and comprehensive advisory process	✓
Financial planning at a preferential price	✓

Monitoring and reporting

Portfolio constantly monitored and optimized by portfolio manager	✓
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)	✓
Tax statement	✓

Ideas and services

Investment ideas, trends, and market developments

Publications: "Mandates Quarterly"	✓
Swift response to market opportunities by a global team of investment experts	✓
Chief Investment Officer video and audio webcast on market developments	✓
Event-based telephone conferences	✓
Invitations to exclusive investment-related events	✓

Online offering and safekeeping account management

Comprehensive and secure online banking: overview of all your assets	✓
Interest, dividends, redemptions, or maturities are promptly credited to your account.	✓

Pricing and transparency

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

For pricing details, please refer to the pricing overview.

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

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