

# Step-by-step instructions for 3a online Mixta trading



# Are you ready?

**This brochure outlines the functionalities of 3a online Mixta trading for both the desktop (computer and laptop) and mobile (CS Direct app) versions of your online banking.**

You must fulfill the following requirements in order to invest Pillar 3a funds in securities online:

- You must be a natural person.
- You must be a Credit Suisse Direct client.
- You must have a Pillar 3a account with a credit balance of at least CHF 100.

## Contents

### Desktop

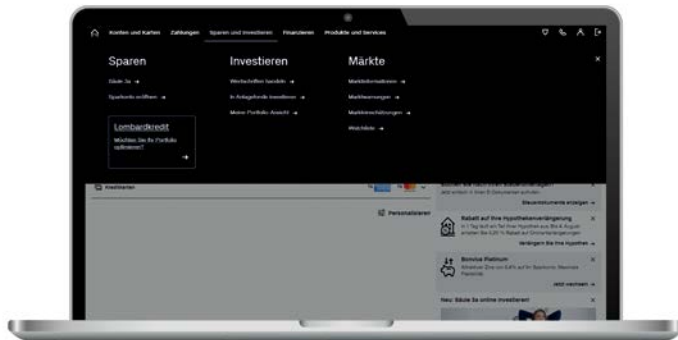
**Purchasing and managing a Pillar 3a securities solution 03**

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### Mobile

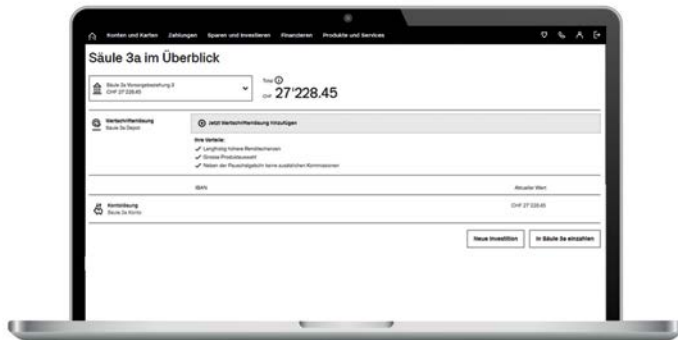
**Purchasing and managing a Pillar 3a securities solution 06**

# Purchasing and managing a Pillar 3a securities solution (1/3)



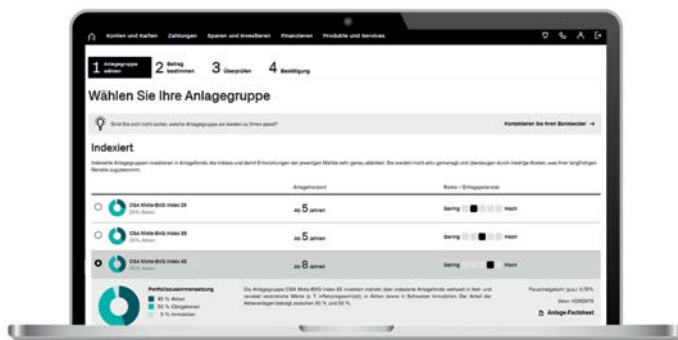
## 01

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



## 02

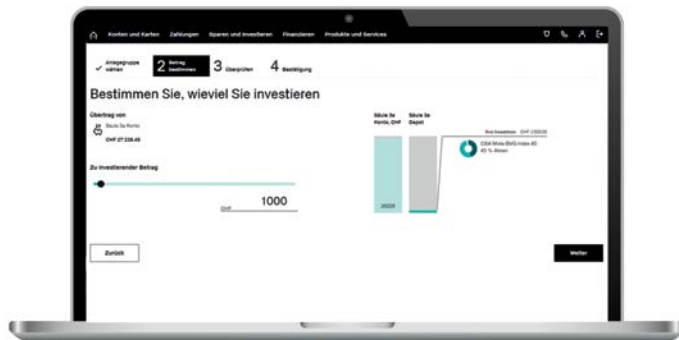
- To purchase a securities solution, click on either **“Add securities solution now”** or **“New investment.”**



## 03

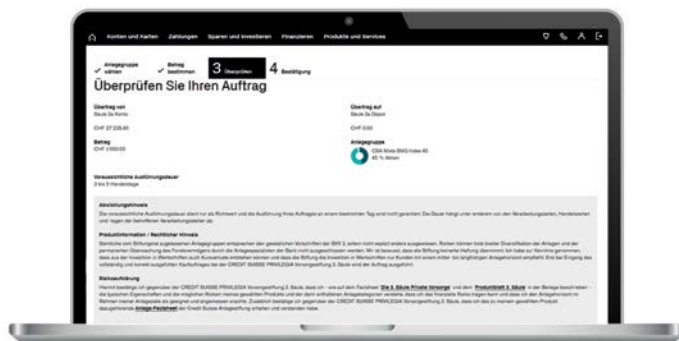
- Click on one of the securities solutions listed for more information (e.g. potential risk/reward ratio, investment time horizon, fact sheet).
- Then select the securities solution you wish to purchase and click on **“Next.”**

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



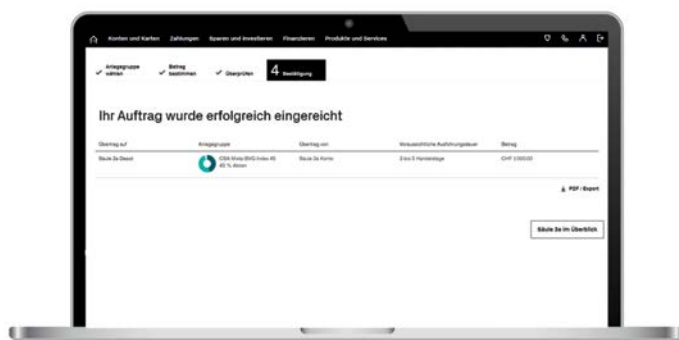
## 04

- Now decide how much you would like to invest. 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.



## 05

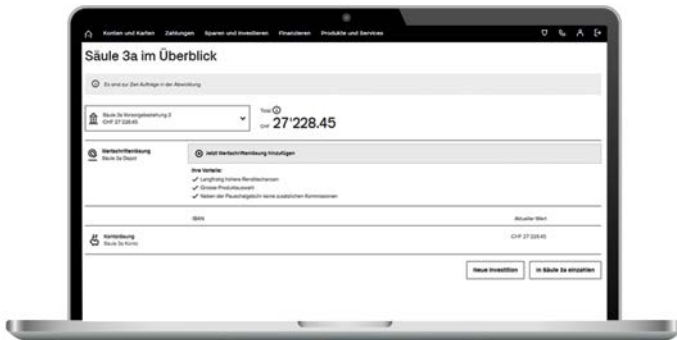
- To complete the order, read and accept the conditions and contractual terms and click on **“Submit order.”**



## 06

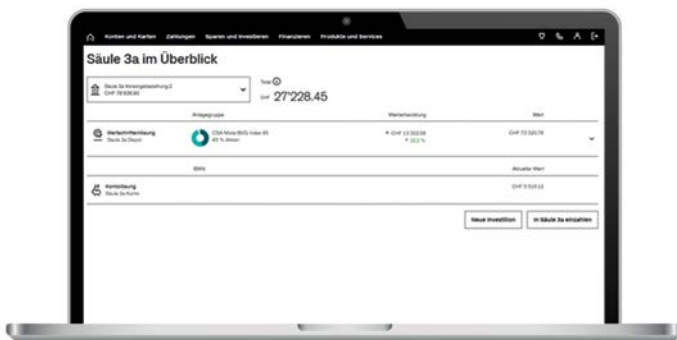
- Your order has been successfully submitted to Credit Suisse. The estimated time to process your order will be displayed on the screen.
- Click on **“Pillar 3a overview”** to go to your personal Pillar 3a overview page.

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



## 07

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



## 08

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

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:

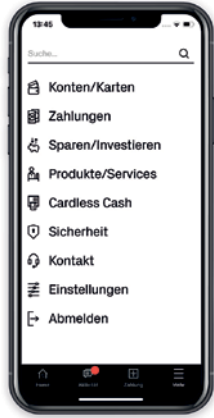


## 09

- 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.**”

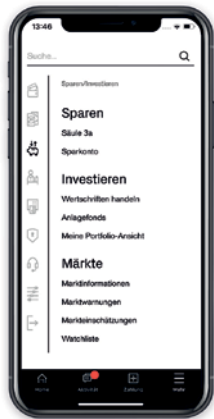
## Mobile

# Purchasing and managing a Pillar 3a securities solution (1/5)



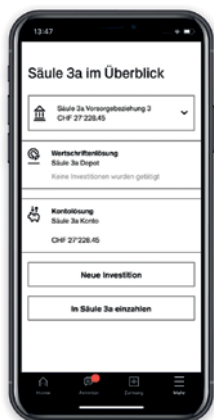
## 01

- Open the Credit Suisse Banking app and log on to Credit Suisse Direct.
- Click on **“More”** and select **“Save/ Invest.”**



## 02

- Select **“Pillar 3a.”**



## 03

- To purchase a securities solution, click on **“New investment.”**

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



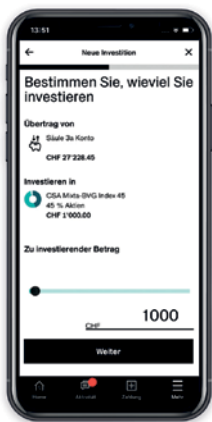
## 04

- 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)



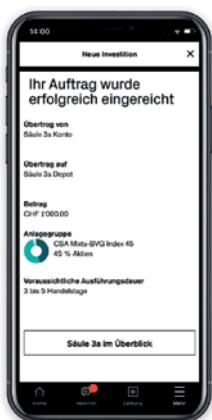
## 07

- 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.”**

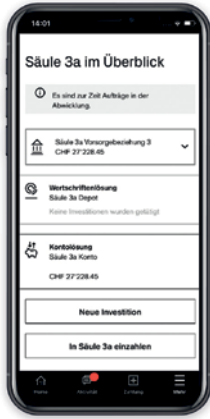


## 09

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

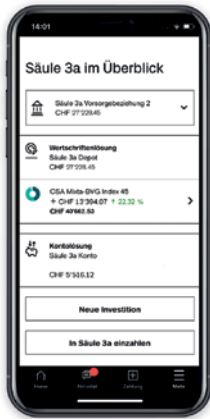


# Purchasing and managing a Pillar 3a securities solution (4/5)



## 10

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



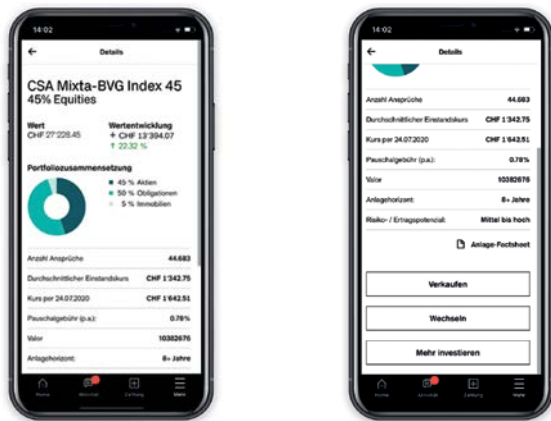
## 11

- 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](https://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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