Financial Consulting
Plan Ahead and Achieve Your Goals

Like nearly everyone, you probably have multiple turning points in the course of your life centered on your financial situation. Your advisor can show you how different events in your life influence your financial planning, and what solutions and actions you can use to gradually achieve your goals.

All Life Events

Regardless of what point you are at in your life, your advisor will work with you to assess the challenges that you are faced with. You will leave with answers to typical questions like:

- Are my assets enough to maintain my standard of living in old age?
- Do I have sufficient coverage against disability and death?
- What happens if I am no longer able to make my own decisions?
- How do I pass my assets on to the next generation?

The focus of our advice depends on the circumstances of your life:

Comprehensive analysis
A general assessment provides you with an overview of your financial situation and allows you to bring your finances more in line with your goals and dreams.

Wealth planning
A professional change, the purchase or sale of company shares or the receipt of an inheritance can result in significant changes in your assets. On the one hand, additional assets offer the opportunity to achieve additional wishes, plans, and goals in the future.
On the other hand, it also means that there are new risks along with new opportunities. We advise you on opportunities and will show you the scenarios that are best for you.

Financial planning
In life, there are always events and wishes that cost money, be it large investments, such as purchasing your own home, or an investment property, an extensive renovation, or the purchase of a second home. Valuable or costly purchases that are not related to real estate also require needs-appropriate financing. We assist you with the purchase or construction of a property or other investments.

Personal planning
Realizing your individual desires and dreams often leads to a new personal situation. Marriage, children and their education, or an upcoming move require a customized investment strategy. However, unforeseen events, such as a divorce or an accident, can result in major financial challenges. We accompany you during changes in your personal or family situation and help you to set the right course.

Retirement planning
Retirement is a milestone in life. The earlier you start planning your retirement, the easier it will be to enjoy it later. We help you achieve your retirement goals and will work with you to find the appropriate strategies.

Inheritance planning
Estate planning calls for careful preparation. It is important to determine whether the statutory provisions are adequate or if individual arrangements need to be made. We think about tomorrow today and help you with everything concerning the transfer of your assets.

Comprehensive Advice
Every life event comes with financial challenges. As part of our financial consultation, your advisor highlights all the areas of activity that apply for the circumstances in your life. Using state-of-the-art financial tools, we can directly analyze your personal situation on site and create decision-making criteria for individual solutions. This allows you to see all the potential for optimization.

Financial Analysis
After the financial consultation, you receive a comprehensive report. This includes an overview of the key personal recommendations and concrete proposals for solutions. We also provide you with information sheets and brochures on your personal recommendations.

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.
Or for more information, visit our website at:
credit-suisse.com/financialplanning

* Telephone calls may be recorded.

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