

Important Documents for your Financial Planning

The following documents are important to obtain a personal consultation that is tailored as accurately as possible to you. These documents allow your advisor to gain an overview of your current situation. Please bring the relevant documents with you to your financial planning – copies are sufficient.

- Latest, detailed tax return (including statement of securities, list of real estate, and schedule of debts)
- Current account and safekeeping account statements of assets held with third-party providers
- Latest pension fund statements and regulations
- Extract from any vested benefits/policies
- Current values of Pillar 3a accounts/policies (incl. surrender value and sum payable at maturity)
- Current values of life insurance policies (incl. surrender value and sum payable at maturity)
- Details regarding your real estate (incl. market value, renovation requirements, mortgage maturities and interest rates)
- Personal annual budget before and after retirement
- Marriage contract/inheritance contract/will/advance directive/divorce settlement

Additionally, if already received from the AHV compensation office:

- AHV pension forecast
- Statement of individual account with AHV

Contact us

We will be happy to arrange a personal consultation.

Call us at 0844 200 114*;

Mon.–Fri., 08:00–20:00.

For more information, visit our website at:

credit-suisse.com/financialplanning

* Telephone calls may be recorded.

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