

Account Transfer Service

Fast, simple, and free transfer of your most important banking services



Benefit from the Free Account Transfer Service¹

If you choose Credit Suisse as your house bank and would like to manage your banking business with the accounts and cards as part of a Bonviva Banking Package, we will provide you with fast and free support with the administration.

Your benefits at a glance:

- Transfer of your accounts, cards, and payment facilities
- Relief in terms of the new set-up of banking services – from salary payments and direct debits through to your standing orders
- Active support in drawing up the necessary correspondence
- The service is free of charge

Frequently Asked Questions

How do I transfer my banking relationship to Credit Suisse?

For us to best meet your needs, please complete the checklist for the account transfer service on page 2 and send it back to us.

Which banking services does the service apply to?

When transferring your banking relationship to Credit Suisse, we will help you to transfer the following banking services:

- Salary/pension account, private and savings accounts, and current account
- Debit cards, credit cards, prepaid cards, Travel Cash cards
- Direct debits, standing orders

Who can benefit from the account transfer service?

Please note that the account transfer service is exclusively for new and existing Bonviva clients. If you do not have a Bonviva Banking Package yet, we will be happy to advise you.

How much does the account transfer service cost?

The account transfer service is free of charge for Bonviva clients.

What does Credit Suisse need to know as the new house bank?

To ensure that Credit Suisse can transfer your existing banking services and payment facilities, we ask that you provide us with the following documents and information beforehand. Use the checklist for this (see page 2 and 3).

1. Existing accounts with corresponding IBAN (private account, savings account, and current account)
2. Existing debit cards, credit cards, prepaid cards, and Travel Cash cards
3. Name and full address of your employer or your pension fund in order to report your new salary or pension account
4. Overview of your billers with standing orders (SO) and direct debits (DD), such as health insurance, telephone provider, landlord, and insurance (tip: You can have an overview printed out by your previous house bank or get one directly from the online banking portal of your previous house bank.)

Contact Us

Your advisor will be happy to arrange a personal consultation. Call us at telephone number 0848 880 844;* Mo.–Fr., 08:00 a.m.–08:00 p.m.

You can find these documents and further information online at: www.credit-suisse.com/accounttransfer

* Please note that telephone calls to these numbers may be recorded. We assume that, by calling us, you accept this business practice.

¹ Employees of Credit Suisse AG with preferential terms and conditions are excluded from this.

Checklist for Account Transfer Service

Only a few steps are required for an account transfer. Please complete the following information in order to transfer your banking relationship to Credit Suisse.

Mandatory fields are marked with (*). Please complete the checklist in BLOCK CAPITALS.

Account transfer service for client

In the name of (first and last name(s))*

1. Accounts

Account type (private account, savings account, etc.)*

IBAN*

In the name of (first and last name(s))*

Closure as of (date)*

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<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>
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2. Cards

Card type (debit cards, credit cards, etc.)*

Card issuer*

Card number*

Expiration date*

In the name of (first and last name(s))*

<hr/>	<hr/>	<hr/>	<hr/>	<hr/>
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3. Employer or Pension Fund

Employer or pension fund*

Contact*

Address (street, no., postal code, town/city)*

<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

4. Biller Overview

Specific information only for standing orders

Institution	Name of institution*	Address (street, no., postal code, town/city)*	IBAN of institution*	DD*	SO*	Amount (CHF)*	Payment from (date)*
<input type="checkbox"/> Health insurance	_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<input type="checkbox"/> Telephone services provider	_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<input type="checkbox"/> Landlord	_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<input type="checkbox"/>	_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____

DD: Direct debit/SO: Standing order

Telephone availability:

If you have any further questions, our account transfer service advisors will be happy to contact you by telephone. Please indicate the best time to reach you (Monday–Friday, 08:00 a.m.–05:00 p.m.).

Telephone/cell phone number*	Date*	Time*
_____	_____	_____

Please have the necessary information on hand for the phone call so that we can help you as much as possible.

Please send the completed checklist back to us.

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