

# Account transfer service



## Transfer your most important banking services quickly, easily, and free of charge

### Take advantage of the free account transfer service from Credit Suisse

If you choose Credit Suisse as your house bank and would like to use our accounts and cards for your banking transactions – no problem. We would be happy to help you with all the arrangements.

#### Your benefits at a glance

- Transfer of your accounts, cards, and payment facilities
- No need for correspondence with the other banks – you can leave it all to us
- Free service for all private clients of Credit Suisse (Switzerland) Ltd. domiciled in Switzerland

#### How do I transfer my banking relationship to Credit Suisse?

In order to enable us to best serve your needs, please fill out the checklist for account transfer service on the reverse. Please send this back to us or drop it off at one of our branches.

#### Which banking services does the transfer service apply to?

We can help you to transfer any of these banking services:

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

#### Who can benefit from the account transfer service?

The account transfer service is free of charge for all new and existing private clients of Credit Suisse (Switzerland) Ltd. domiciled in Switzerland. If you are not yet a Credit Suisse client, we will be happy to advise you on appropriate banking products – for example, our Bonviva banking packages with accounts, cards, and more, all for a clear, fixed monthly price.

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

To enable Credit Suisse to transfer your accounts, cards and payment facilities, we ask that you provide us with the following documents and information beforehand. In order to do so, please use the checklist on the back.

1. Existing accounts with corresponding IBAN (private accounts, savings accounts, and current accounts)
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 notify them of your new salary or pension account
4. List of your outgoing payments with standing orders and direct debits (DD) such as health insurance, telephone provider, landlord, and insurance

#### Tip

You can request an overview of your existing banking services from your previous bank, or find this information on your previous bank's online banking portal.

# 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 in CAPITAL LETTERS and list only one person per checklist.

CIF number (if available)

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 on (date)*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## 2. Cards

Card type (debit cards, credit cards, etc.)*	Card issuer*	Card number*	Valid until	In the name of (first and last name/s)*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## 3. Employer or Pension Fund

Employer or pension fund*	Contact*	Address (street, number, postal code, city)*
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

## 4. Biller Overview

Institution	Name of institution*	Address (street, number, postal code, city)*	IBAN of institution*	Specific information only for standing orders			
				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.).

Phone/mobile 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.**

### Contact Us

Your advisor will be happy to arrange a personal consultation. Call us at 0848 880 840.\* Lines are open Monday to Friday from 8:00 a.m. to 8:00 p.m.

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

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