

My Life Plan



Client Overview as of 22.02.2023

Sam Sample
 Address: Schulstr. 2, 8002 Zürich
 Customer no: 043123456789
 Your Relationship Manager: Sandro Di Sabado

1. Financial Situation	2
1.1 Assets and Liabilities	
1.2 Income and Spending	
1.3 Safety reserves / Future inflows and outflows	
2. My Life Plan	4
2.1 My personalized wealth plan	
2.2 My goals and financial simulation example	

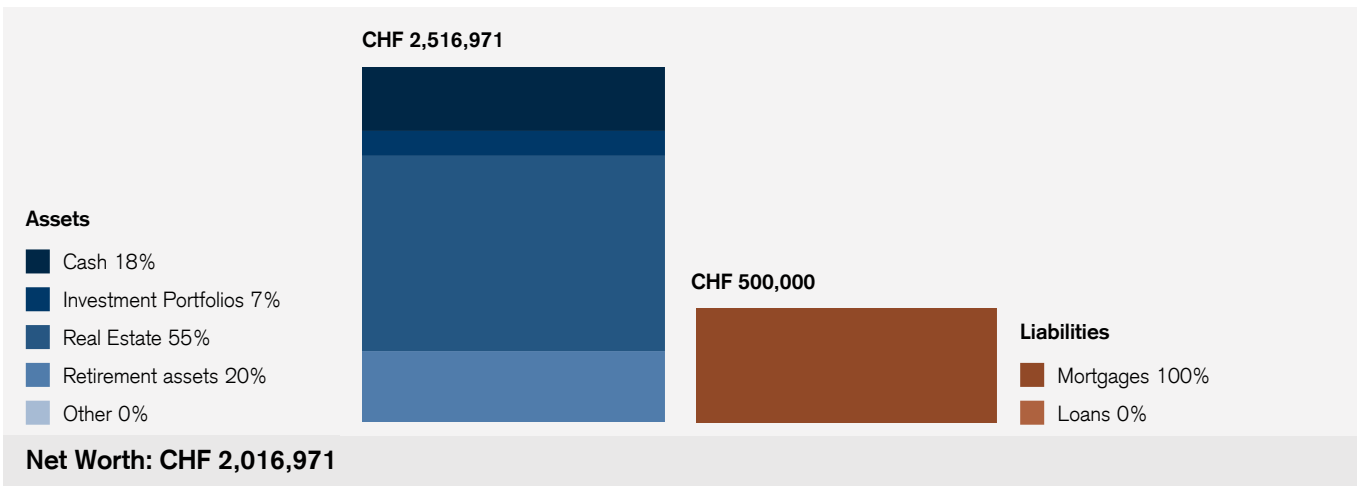
Wealth planning prepares you for all steps of your life.

1. Financial Situation

We have compiled together with you the key elements of your current financial situation. A comprehensive view on your assets, liabilities, incomes and spendings allows us to properly define your risk ability and to show you how your total wealth might develop going forward.



1.1 Assets and Liabilities



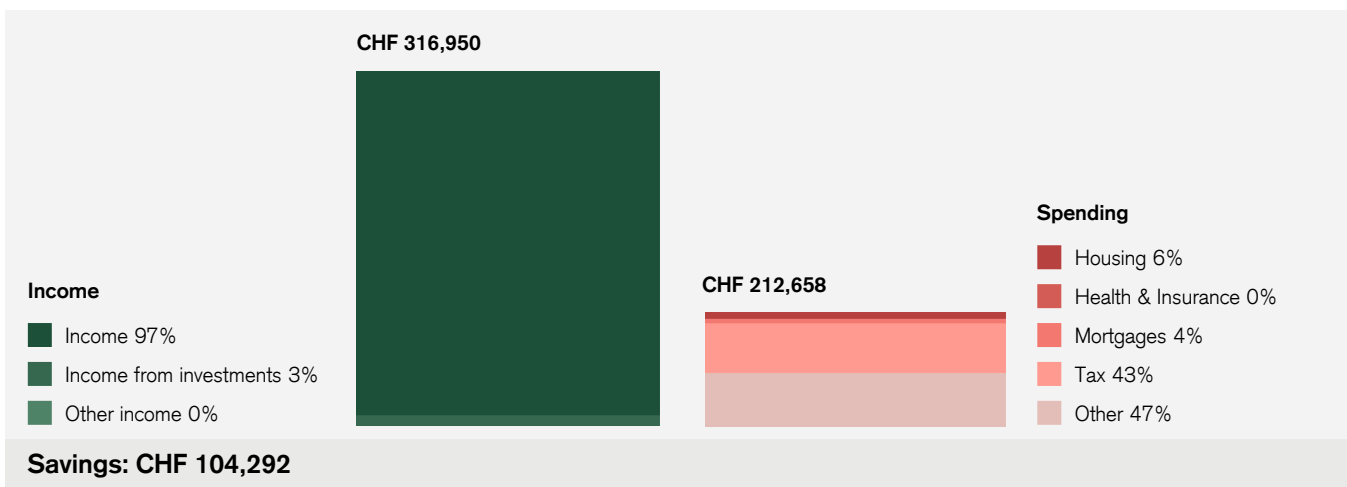
Assets

Cash	CHF 444,835
With Credit Suisse	
CSX Current account	CHF 44,835
With Others	
Other	CHF 400,000
Investment Portfolios	CHF 179,354
With Credit Suisse	
043123456789	CHF 179,354
Real Estate	CHF 1,380,000
With Credit Suisse	
Real Estate	CHF 1,380,000
Retirement assets	CHF 512,782
With Others	
Pensions	CHF 512,782
Other	CHF 0
Total	CHF 2,516,971

Liabilities

Mortgages	CHF 500,000
Mortgage	CHF 500,000
Loans	CHF 0
Total	CHF 500,000

1.2 Income and Spending



Income		Spending	
Income	CHF 308,000	Housing	CHF 13,800
Bonus	CHF 88,000	Rent	CHF 13,800
Income	CHF 220,000	Health & Insurance	CHF 0
Income from investments	CHF 8,950	Mortgages & Loans	CHF 7,500
Fond	CHF 1,800	Mortgage	CHF 7,500
Other banks	CHF 7,150	Tax	CHF 91,358
Other income	CHF 0	Tax	CHF 91,358
Total	CHF 316,950	Food, leisure and others	CHF 100,000
		Spending	CHF 100,000
		Total	CHF 212,658

1.3 Safety reserves / Future inflows and outflows

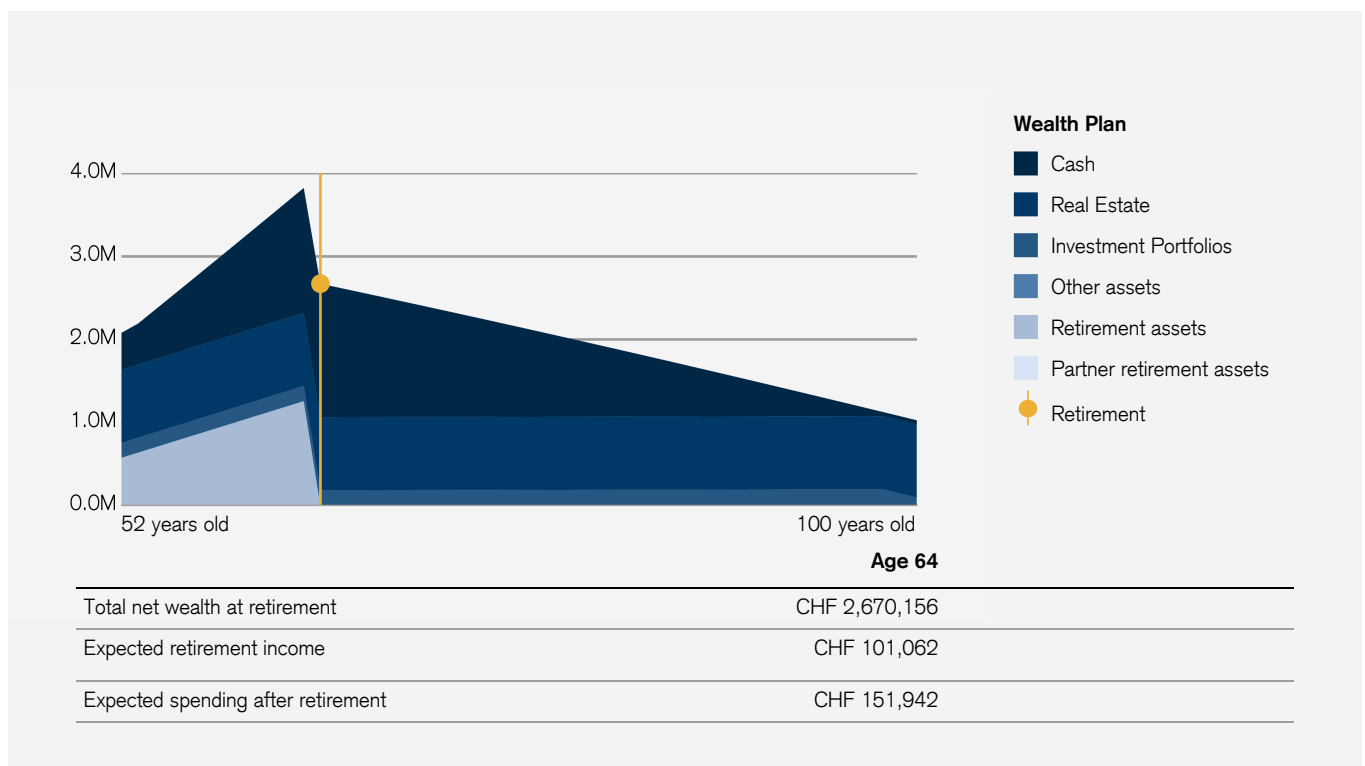
My safety reserves		Future inflows and outflows	
Safety reserve	CHF 50,000	01.01.2025	Exchange year US University daughter - CHF 50,000

2. My Life Plan

Based on the knowledge of your current financial situation we project the future development of your total wealth. This is the center piece of your wealth plan containing tailored advice on how to achieve your goals and a list of financial checks where you should act upon.



2.1 My personalized wealth plan



2.2 My goals and financial simulation example

Goals	Financial Simulation
Your Dreams & Life Events	Information purposes only, does not constitute a personal investment advice/offer.
Save for your family	Liquidity evaluation
Your Inheritance	Summary:
Plan your legacy	Strategy example
Your Investments	Product example
Grow your wealth	Amount to be invested CHF 25,477
	Timing



CREDIT SUISSE (Switzerland) Ltd.

Private Banking

P.O. Box

CH-8070 Zürich

credit-suisse.com

This document was produced for informational purposes and does not constitute an offer. This report is based exclusively on the data and documentation that you have provided. Credit Suisse has verified neither the completeness nor the accuracy of this data. Although Credit Suisse has compiled this report with the greatest of care, it cannot assume any liability either for the completeness of the analysis or for the correctness or appropriateness of the findings or recommendations based thereon. You bear sole responsibility for the decision to implement any or all of the measures proposed and for any risk associated with this decision. The information provided herein does not constitute investment advice or an invitation to enter into a financial transaction. Credit Suisse assumes no liability for losses that may arise from the use of this information. This document was produced solely for you, and it may not be distributed to or used by other natural persons or legal entities. In particular, it was not produced for persons with ties to the US.

This document comprises an advertisement and is not a prospectus, a basic information sheet (Basisinformationsblatt, BIB) or a key information document (KID). The prospectus (the "Prospectus") in connection with the offer to the public or admission to trading (as applicable) of the securities described in this advertisement (the "Securities"), is available on the relevant issuer's website or upon request from the date of its publication (which may be before, on or after the date of this advertisement). The BIB or the KID (for a product which was meant to be offered to retail clients) is available on the website of the issuer or can be made available through your Credit Suisse contact upon request. In case of additional questions, please also refer to your Credit Suisse contact. Approval of the Prospectus by the relevant competent authority is not an endorsement of the Securities offered or admitted to trading, as described in the Prospectus. This document is not a summary of the Prospectus and should not be regarded as a substitute for reading the full Prospectus. Potential investors should not subscribe for or purchase any Securities referred to in this document except on the basis of information contained in the Prospectus in its final form and any supplementary prospectus. Potential investors should read the Prospectus before deciding whether to invest in the Securities in order to fully understand the potential risks and rewards associated with any decision to invest in the Securities. You are about to purchase a product that is not simple and may be difficult to understand.

If you provide us with data belonging to third parties, particularly that of your spouse or registered partner, you shall assure us that the data is complete and correct, and that the third parties have consented to you disclosing the data to the bank and that the data can be used by the bank to help with financial and wealth planning. Please also make sure to provide corresponding proof of this at the bank's request in the form of written confirmation by the third parties.

Copyright (c) 2023 Credit Suisse Group AG and/or its affiliates. All rights reserved.