

Credit Suisse Invest Compact



The Compact investment solution

Thanks to our flexible investment solutions, you choose the scope of advice, portfolio monitoring, and investment proposals according to your personal needs. In all cases, you can count on our global financial expertise.

The Compact investment solution offers an easy and simple service for covering your basic investment needs at an attractive price. Your personal advisor supports you in all investment-related inquiries and is your point of contact for a comprehensive approach to your financial concerns. Once a year, you will discuss your investment portfolio with your advisor in order to align your investment strategy with your needs and preferences.

You will be given access to proven investment strategies. Our straightforward publications keep you updated on market developments and give you access to strategic investment ideas devised by our global team of experts.

You maintain an overview of your investments thanks to our comprehensive online banking as well as transparent reports on the performance of your investments, issued twice a year.

Your needs

- A personal, simple, and efficient approach to investment advice
- A review of your investment strategy and portfolio
- A solution to cover your long-term investment needs

How you benefit

- A personal advisor for all of your financial questions
- An annual discussion of your investment portfolio
- Proven investment strategies and strategic investment ideas
- Detailed reports on the performance of your investments
- Efficient online banking as a comprehensive trading and information platform
- A monthly update on economic and market developments

Risks you face

- An advisory agreement provides no guarantee of positive returns.
- According to the advisory agreement, the client retains responsibility for investment decisions.
- For information on the risks of individual investment instruments, please refer to the product documentation.

Contact

Your advisor will be happy to arrange a personal consultation with you. Call us at 0844 844 007*

credit-suisse.com/invest

* Please note that telephone calls to our numbers may be recorded. We assume that, by calling us, you give your consent to this business practice.

Services of Credit Suisse Invest Compact

Support and interaction

Personal advisor	✓
Strategic advisory meeting	1 × per year
Sophisticated and comprehensive advisory process	✓
Investment strategies based on individual needs, risk preferences, and risk profile	✓
Suitability test (e.g. evaluation of whether products are suitable for your risk tolerance)	✓

Monitoring and reporting

Portfolio review: analysis of portfolio quality in the strategic advisory meeting	1 × per year
Standard Investment Report: comprehensive information about all investments and their development	2 × per year
Online overview of the performance of your investments (choice of different time horizons)	✓

Ideas and services

Investment ideas, trends, and market developments

"Economy & Markets" publication	1 × per month
Access to investment ideas as part of the strategic advisory meeting	1 × per year

Online offering and online trading

Comprehensive and secure online banking: overview of all your assets	✓
Efficient platform for fast and secure trading on more than 60 stock exchanges worldwide	✓
Prompt implementation of client instructions and corporate actions (e.g. capital increase, stock split)	✓

Pricing and transparency

Simple and transparent pricing	✓
Attractive transaction fees	✓
Access to retrocession-free investment funds	✓

For pricing details, please refer to the pricing overview.

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