

Credit Suisse Invest Expert



The investment solution for dedicated investors

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.

With our Expert investment solution, you have a finger on the market pulse and receive investment advisory service at the highest level. In addition to a personal advisor as your central point of contact, we provide you with an investment consultant who will stand by your side. This investment expert is your direct link to the global markets. The investment consultant offers in-depth advice on all asset classes from a single source. Moreover, your regional investment consulting team ensures a high level of availability and rapid execution of your orders.

Your investment consultant will develop an investment strategy with you tailored exclusively to your needs. They will proactively contact you on a regular basis to discuss current investment opportunities and potential risks.

A comprehensive report and regular portfolio quality alerts help you to identify opportunities and risks in your portfolio and to make the necessary adjustments at an early stage.

The Expert investment solution includes an annual tax statement. In addition to thorough analysis and long-term optimization of your assets, you have access to financial planning at a preferential price.

Your needs

- Exploit investment opportunities
- Regular dialogue with investment experts
- Dynamically adjust your investment strategy or asset allocation
- Access to global markets and a broad investment universe

How you benefit

- A personal advisor as a central point of contact for all financial queries and a personal investment consultant as your dedicated investment expert
- Tailor-made investment strategy and implementation
- Proactive contact in the event of new investment opportunities and potential risks
- Regular strategy check and suggestions for adjustments
- Portfolio quality reports and alerts for promptly identifying potential portfolio issues

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*, Monday – Friday, 8:00 a.m. – 8:00 p.m.
[credit-suisse.com/invest](https://www.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 Expert

Support and interaction

Personal advisor and personal investment consultant	✓
Strategic advisory meeting	1 × per year
Sophisticated advisory process for defining a customized investment strategy	✓
Suitability test (e.g. evaluation of whether products are suitable for your risk tolerance)	✓
Access to additional product experts	✓
Financial planning at a preferential price	✓

Monitoring and reporting

Portfolio monitoring

Portfolio review: daily assessment of portfolio quality (available online)	✓
Portfolio quality report (analysis of portfolio quality based on multiple factors)	12 × per year
Portfolio quality alerts via text message, email, or letter	Ongoing
Alerts when the price of stocks in your safekeeping account changes significantly (credit-suisse.com/companyalerts)	✓
Individualized price level alerts	Ongoing

Performance reporting

Standard Investment Report: comprehensive information about all investments and their development	Up to daily
Online overview of the performance of your investments (choice of different time horizons)	✓
Impact simulation of historic market events on the investment portfolio performance	✓
Tax statement (flexible production date)	✓

Ideas and services

Investment ideas, trends, and market developments

Publications: "Investment Monthly," "Investment Weekly," "Investment Daily"	✓
Access to strategic and tactical investment ideas via investment consultant	✓
Portfolio review with customized trading recommendations for portfolio optimization	Multiple times per year (as desired)
Chief Investment Officer points of view and video webcast on market developments	✓
Event-based telephone conferences	✓
Invitations to exclusive investment-related events	✓

Online offering and online trading

Comprehensive and secure online banking: overview of all your assets	✓
Portfolio monitoring functions via online banking	✓
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)	✓
Customized foreign exchange transactions and structured products via online banking	✓

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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[credit-suisse.com/invest](https://www.credit-suisse.com/invest)

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