

# Credit Suisse Invest Partner



## The investment solution for demanding 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 the Partner investment solution, you can identify investment opportunities at any time without ever losing sight of the 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. You are in regular contact with your personal advisor, who supports you in all investment-related inquiries and is your central point of contact for all your financial concerns.

You also receive detailed insight into investment opportunities and trends thanks to research publications and analyses of market developments by our global 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 quarterly.

The Partner 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

- A central point of contact
- Active advice and support for optimizing your portfolio and benefiting from market opportunities
- Ongoing monitoring of your portfolio
- Notifications in the event of portfolio issues

### How you benefit

- A personal advisor as a central point of contact for all of your financial questions
- Comprehensive quarterly portfolio quality reports highlighting key developments and potential issues in your portfolio
- Portfolio quality alerts to enable an immediate response to potential risks
- At least one annual discussion of investment strategy
- Regular tips on current investment opportunities
- Research publications with market appraisals and analyses

### 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.

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### 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 Partner

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### 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)	✓
Access to additional product experts	✓
Financial planning at a preferential price	✓

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### 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)	4 × per year
Portfolio quality alerts via text message, email, or letter	Ongoing
Alerts when the price of stocks in your safekeeping account changes significantly ( <a href="https://www.credit-suisse.com/company/alerts">credit-suisse.com/company/alerts</a> )	✓

#### Performance reporting

Standard Investment Report: comprehensive information about all investments and their development	4 × per year
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	✓

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### Ideas and services

#### Investment ideas, trends, and market developments

Publications: "Investment Monthly," "Partner Newsletter"	✓
Access to strategic investment ideas via personal advisor	✓
Portfolio review with customized trading recommendations for portfolio optimization	Multiple times per year (as needed)
Chief Investment Officer points of view and video 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	✓
Functions on portfolio monitoring 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)	✓

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### 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.



**CREDIT SUISSE (Switzerland) Ltd.**

P.O. Box 100

CH-8070 Zurich

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