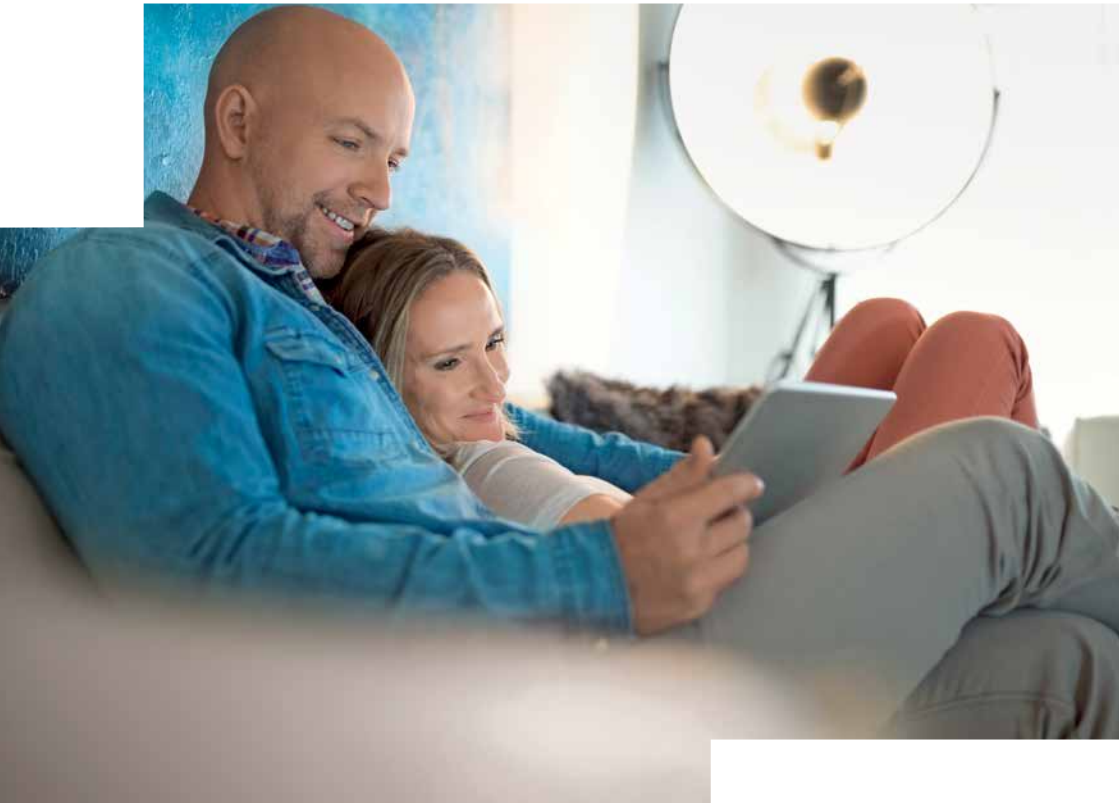


Financial planning

CREDIT SUISSE 

Financial planning. No matter what comes your way.



Your stage of life.
Our advice.

Financial planning is planning for life

You can take care of your long-term financial future – even during your studies.

You can optimally finance a good education for your children.

You shoulder the financial implications of changes in your professional life without any problems.

You determine the ideal time for your retirement.

Benefit from Credit Suisse's combined expertise to find an individual solution to your questions regarding financial planning. Your advisor will confer with experts depending on whether you've come to us for financial, tax or inheritance consulting.



Our advisory services

Financial consulting

We work with you to analyze your assets and liabilities, your pension provision and your tax situation.

Tax consulting

We'll help you optimize the tax impact of your assets, liabilities, succession solutions, and withdrawals of your pension capital.

Inheritance consulting

Whether an advance directive, marriage contract, inheritance contract or will, our inheritance consulting service will provide you with information about the legal framework conditions.

Which advisory service is right for you?

Find out now at [credit-suisse.com/financialplanning](https://www.credit-suisse.com/financialplanning)

For all stages of life

Tailored to fit your needs

Career start, family, inheritance – your financial needs change over time. That is why our advice is always based on your current life situation.



Training and education

You are laying the foundation for your career and taking control of your life. We will help by providing practical advice as you take your first steps toward a successful future.



Building your career

Getting your career started is exciting and offers many opportunities. We will show you how to put your income to good use and will answer your financial questions.



Professionally established

You are in the prime of your life and are assuming responsibility in your occupation. As a result, you have special financial questions and needs. We will advise you on all the important issues.



Retirement

Good financial planning for retirement starts on your first day at work. After all, the sooner you start thinking about your retirement provision, the more carefree your retirement will be.

Our products

Plan your pension today

With a broad product portfolio, we offer accounts and securities solutions for the 2nd and 3rd pillar.

Vested benefits account – 2nd pillar

Are you very security conscious and want to avoid risks when it comes to your pension fund assets? When you quit or interrupt your gainful employment, your pension fund assets are optimally set aside in our Vested benefits account – 2nd pillar.

Pension account – 3rd pillar

The Private pension – 3rd pillar supplements the state pension and employee benefits insurance and helps close any pension gaps. In addition, your savings deposits can be fully deducted from your taxable income (up to the statutory maximum amount). When you opt for our Pension account – 3rd pillar, you opt for maximum security.





2nd and 3rd pillar securities solutions

Saving with securities in the 2nd and 3rd pillar offers you the opportunity to generate returns in the long term that will exceed the interest of the Vested benefits account – 2nd pillar or the Pension account – 3rd pillar. Select the right solution for you based on your time horizon and investment risk.

Many big events in life come with financial challenges. Our advisors will help you tackle them.

Take the first step today and schedule a **personal consultation**. Please contact us!

0844 200 114*

* Telephone calls may be recorded.

Plan online

You will find additional pension services such as our financial tools on the internet.



Online financial tools

Various pension calculators are available to you online. They answer questions such as how much your pension will be when you retire or what tax benefits there are with a staggered withdrawal of retirement savings. You can also take advantage of our 3rd pillar online advisory service.

Open an account directly

You can also open a Pension account – 3rd pillar or a 3rd pillar securities account online. If you are already a Credit Suisse client, it is even easier to open an account. It just takes a few clicks in Credit Suisse's Online Banking.

credit-suisse.com/pensions

Contact us



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Our online Office Locator can be found at [credit-suisse.com/locations](https://www.credit-suisse.com/locations)

You can reach us from Monday to Friday
at **0844 200 114***

Further information about our offers can be
found at [credit-suisse.com/financialplanning](https://www.credit-suisse.com/financialplanning)

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