

Private Mandate
Your Goals, Our Global
Investment Expertise



An Integrated Bank, Trusted Worldwide.

With Credit Suisse you feel secure knowing that one of the world's largest and most experienced banks is managing your investments – a bank with a 150-year premium private banking tradition and global investment banking capabilities. You join a community of clients around the world who trust Credit Suisse to understand their individual needs, and to apply its power and skills as an integrated bank to helping them achieve their investment objectives.





The Satisfaction of Setting Your Own Investment Objectives. The Security of Having Credit Suisse to Help Get You There.

You are accustomed to setting your own goals in life. You prefer to choose your own path and enlist the most expert advisors to help you follow it.

With a Credit Suisse Private Mandate you can have distinguished investment professionals manage your portfolio for you in an optimum manner, according to your investment objectives and tailored to your personal preferences and financial situation.

With its high degree of customization and investment expertise, a Private Mandate is the perfect complement to the financial guidance provided by your Credit Suisse Relationship Manager.

Selecting Your Own Private Mandate.

Your Private Mandate is designed to help you achieve your investment objectives. You can trust your Relationship Manager to take the time to understand you, your financial needs and preferences. And the deep expertise of the Credit Suisse investment professionals working on your behalf every day will add to your peace of mind.

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First, consult with your Relationship Manager to determine which of the five Private Mandate strategies suits you. What are your investment objectives and where are you in your wealth cycle? What role will these portfolios play in your overall financial plan? We show you the opportunities and risks of your Private Mandate in a simple, transparent way.

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Second, customize your Private Mandate. Depending on your choice, you will find your Private Mandate matches your investment style, risk tolerance, and financial goals, with a wide range of available options. Define your preferred currency, as well as the type of instruments to be used (such as direct investments, investment funds, and alternative investments) and whether you would like more or less foreign currency.

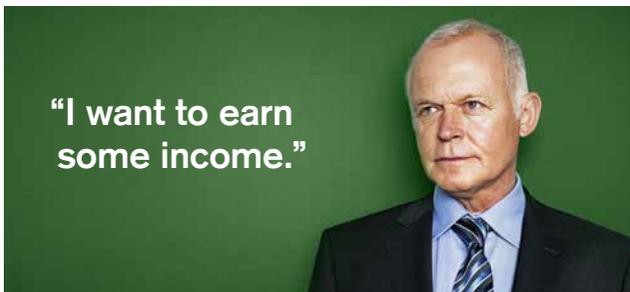
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Third, we manage your Private Mandate, applying the bank's global investment expertise in a structured and disciplined investment process. Our team of over 300 experts systematically selects suitable financial products, markets and currencies to help you reach your desired result. They are constantly ready to respond and adapt to changing markets – while keeping you informed.

Throughout the process, you have the comfort of knowing that we keep you clearly and continually up to date with detailed reports, timely analysis from our global research and one-on-one meetings. Your Relationship Manager reviews your mandate strategy regularly with you, and you jointly decide if the strategy is still right for you.

Five Compelling Strategies to Fit Your Specific Needs.

Your Objective



Your Strategy

Preserve

Seeks capital preservation using a conservative approach

Yield

Seeks income generation while also generating some capital gains through selected equity investments; option with regular payout available

Balanced

Seeks long-term capital appreciation, balancing risk and return

Growth

Seeks long-term capital growth by capturing the full potential of equity markets while maintaining an anchor in bonds

Long-Term Growth

Seeks high rate of long-term capital growth

Ask your Relationship Manager for further details about each of these investment strategies.

What Shapes Your Private Mandate?

The composition of your Private Mandate is the product of Credit Suisse's clearly structured procedure, professional expertise and many years of experience.

Each strategy follows an investment process in which an asset allocation is specified across various asset classes, such as money market investments, bonds, and equities. Our open product platform provides access to a selection of carefully evaluated third-party and Credit Suisse investment instruments to fit your needs. These include a variety of alternative investments, which can be included in your Private Mandate as an additional means of diversifying risk. This flexibility lets us exploit market fluctuations and manage risk to your advantage through financial cycles.

Our Yield, Balanced, Growth and Long-Term Growth mandates follow the asset allocation strategy designed by our Chief Investment Officer and his global team. They also constantly monitor and adjust the tactical asset allocation and decide on the weighting of asset classes, regions, sectors and currencies.

Our Preserve strategy is based on clearly defined investment rules designed by our Chief Investment Officer and his global team and supported by tools to monitor risk and exploit market opportunities. Preserve uses a conservative approach to allocate capital between more and less risky assets depending on the level of market volatility. The strategy aims to cushion the portfolio during downward cycles while allowing for moderate gains in upward markets.

Our Investment Process.¹

Three Sources of Potential Returns.



Managing portfolio risk
Review of portfolio consistency and regular risk monitoring.

¹ For illustrative purposes only. Differences in the investment process may apply according to type of mandate: Yield, Balanced and Growth strategies are actively managed. Preserve and Long-Term Growth follow a rule-based investment approach.

A Seasoned, Experienced Team.

The Credit Suisse Private Banking & Wealth Management investment team is one of the financial world's largest, most respected research and investment organizations.

With our team of over 300 experts, you benefit from the broad, global investment expertise of Credit Suisse and our structured and disciplined investment process.

Our Chief Investment Officer and his management team have long experience in transforming research and analytical insights into asset management strategies. One of the world's broadest and deepest teams of research analysts and portfolio managers supports them.

You can be confident that our experts monitor your portfolio for a timely response to market developments. Our ongoing risk management process changes asset allocation when needed to keep your portfolio in line with your risk tolerance.



Questions and Answers.

Why choose a Private Mandate?

You enjoy the reassurance of having one of the world's most trusted financial institutions manage your investments according to your preferred objectives. Your Credit Suisse Relationship Manager understands you and helps you select the right portfolio strategy to meet your risk tolerance and financial needs. With the experience of a premium private bank and the capabilities of a global investment bank, a Private Mandate gives you the peace of mind of having well-qualified, seasoned managers looking after your investments.

What does the Private Mandate include?

You consult with your Relationship Manager and select the portfolio strategy that is right for you: Preserve, Yield, Balanced, Growth or Long-Term Growth. Each is clearly defined, and designed to match your investment style, risk tolerance and investment objectives, with the level of customization that is right for you. You have the confidence of knowing that the investment approach you have chosen is managed according to clear objectives aligned to your needs.

How does the investment process work and who is responsible?

Credit Suisse's seasoned global investment team manages your portfolio according to an asset allocation strategy or a clearly defined set of investment rules designed by the Credit Suisse Chief Investment Officer, regional investment officers and specialists. Their disciplined investment process offers multiple sources of investment performance, with constant monitoring and management of risk. They are ready to respond and adapt to changing markets through their choice of asset classes, regions, sectors and currencies – while keeping you informed.

What are the risks?

Returns depend on the strategy, asset allocation, securities and correct market views.

No capital protection or return guarantee nor guaranteed achievement of investment objectives.

The liquidity of the instruments depends on the product and the respective market environment.

Results may be affected by the performance of foreign currencies.

Market developments can influence the portfolio and result in losses.

Can We Help You Achieve Your Investment Goals? Get in Touch.



Visit us at the branch or office closest to you. Our office locator is available on our website credit-suisse.com/locations



Get in touch. Call us at 0848 880 844* from Monday to Friday. We look forward to hearing from you.



Reach us online at credit-suisse.com/discretionarymandates

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



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