

WEALTH MANAGEMENT

# BCV Conseil Plus

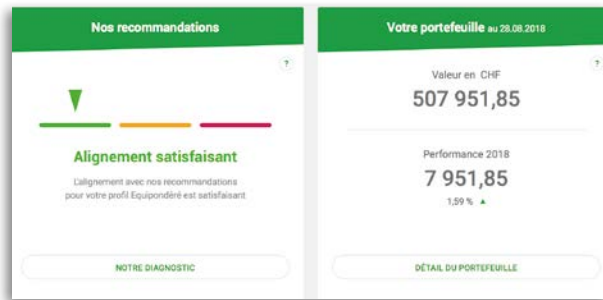
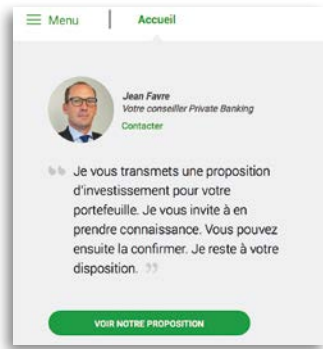
Expert advice to help you make  
the right investment choices



You are an experienced investor with sophisticated investment requirements. You take a dynamic approach to managing your portfolio but would also like the support of a Private Banking advisor who is backed by a team of in-house investment specialists. Our BCV Conseil Plus advisory service was designed with you in mind. It includes personalised recommendations and market reports to give you the flexibility you need to make your own investment decisions.

## Your investment partner

With BCV Conseil Plus, we take a more active approach to our partnership with you. This involves sending you investment opportunities, which you can then take or leave as you see fit. Your Private Banking advisor will be there to help you achieve your investment goals. You can meet with your advisor as often as you wish – in addition to your 24/7 access to our online platform where you can view your portfolio, performance reports and tactical opportunities.

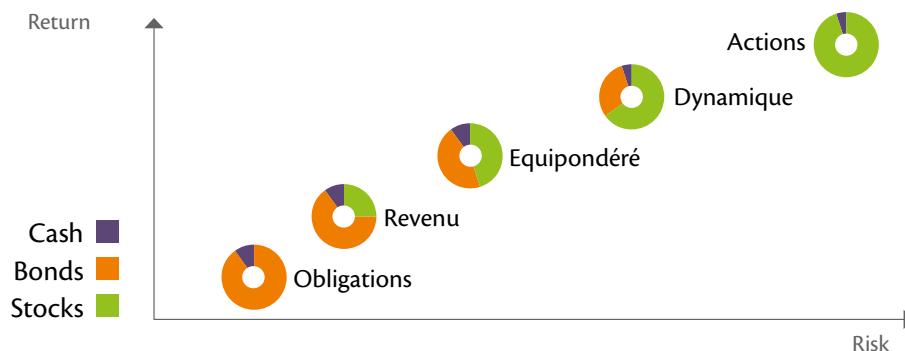


- Core portfolio
- Aggressive investments
- Defensive investments
- Security investments
- Cash and cash equivalents

## Risk management

With BCV Conseil Plus, your core portfolio will be invested in line with BCV's investment strategy and your risk profile. That means your portfolio is always geared towards your long-term strategy. You then decide how to invest the remaining 40% of your assets through tactical opportunities. To help you with this, we will send you tailored investment proposals, taking our cues from your portfolio's risk profile.

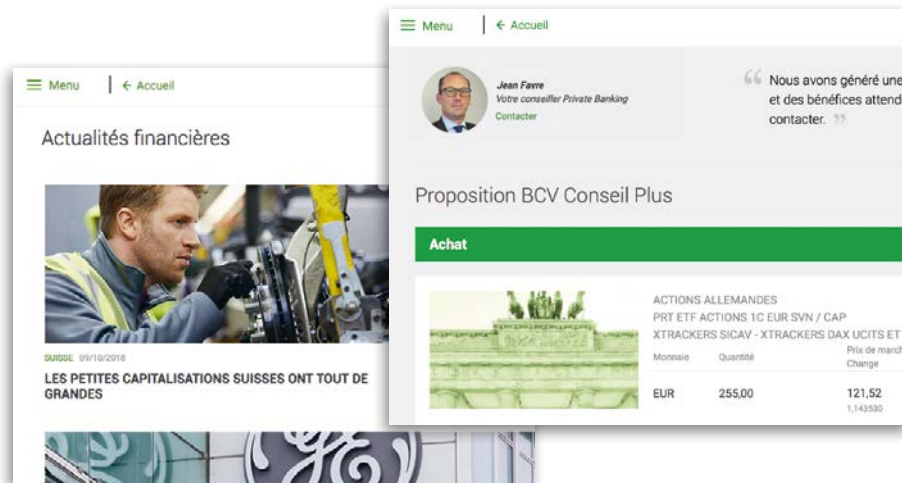
Asset allocation in line with your risk profile



# A dynamic approach

Your Private Banking advisor is backed by a team of in-house investment specialists who have their finger on the pulse of the markets. Thanks to their skills in identifying trends, your advisor will be able to provide you with a range of proprietary and third-party products that enable you to tap into specific investment themes. Not only will you benefit from these opportunities, but your portfolio will remain on the right track.

With BCV Conseil Plus, you have the information you need to make informed decisions about your advisor's investment proposals, ensuring you are always in the driving seat.



## Benefits

- > You will have a dedicated Private Banking advisor at your disposal.
- > You will receive an investment proposal tailored to your financial goals.
- > You will have access to our secure online platform for a detailed view of your portfolio's performance and value.
- > You will be informed of investment opportunities and receive buy and sell recommendations.
- > You will hear what BCV's strategists and specialists have to say through interviews and reports.
- > You will receive relevant articles and topic-specific information about the latest economic news and market developments.
- > We will double check your orders prior to execution.
- > We will regularly analyse whether your investments are in line with your financial objectives.
- > Your advisor will review your portfolio with you once a year.



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[www.bcv.ch](http://www.bcv.ch)

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