

INVESTMENT SOLUTIONS

BCV Conseil Plus



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 consists of a core portfolio built around asset allocation funds along with a tactical component that gives you the flexibility 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 and can meet with you as often as you wish. You will also have 24/7 access to our interactive online platform where you can view your portfolio, performance reports, and tactical opportunities.



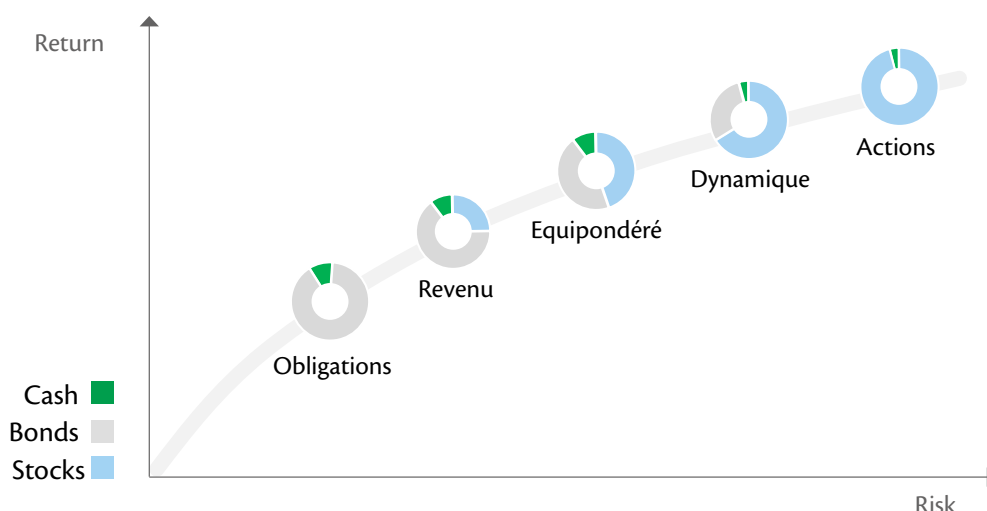
- Core portfolio
- Aggressive investments
- Defensive investments
- Security investments
- Cash and cash equivalents

A dynamic approach paired with rigorous risk management

With BCV Conseil Plus, your core portfolio is built around a diversified investment fund aligned with BCV's investment policy and your profile. This means your portfolio is always geared towards your long-term strategy.

You then decide how to invest the remaining portion of your assets through tactical opportunities that align with your financial objectives. Our experts identify such opportunities by combing the markets in search of the most promising investment themes.

Asset allocation in line with your risk profile

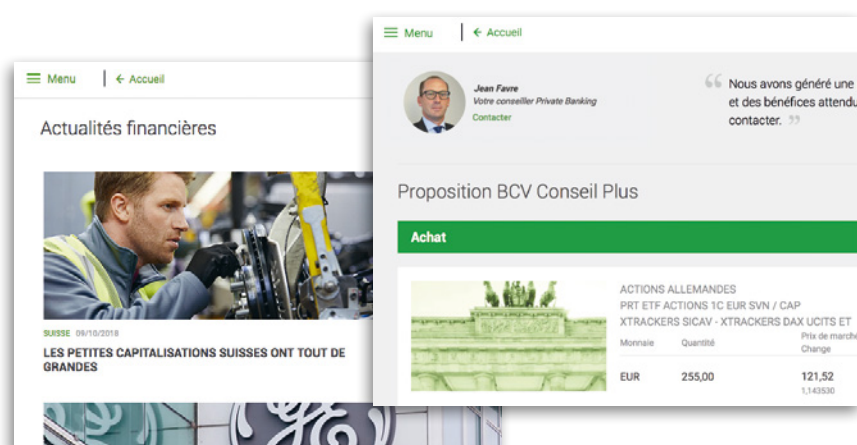


In addition, you will enjoy maximum legal protection because you are treated as a non-qualified investor.

Investment universe

With BCV Conseil Plus, we recommend a selection of financial instruments that have been carefully vetted by our investment specialists. These consist entirely of investment funds and structured products.

A significant proportion of the financial instruments we recommend through this service are issued by BCV. These are supplemented by third-party products, in particular for types of investments that BCV does not offer.



Fees

The fee schedule for BCV Conseil Plus is simple, transparent, and competitive. It includes an advisory fee, a reduced administration fee for your securities account, and attractive flat-rate transaction fees.

Benefits

- > You will have a dedicated Private Banking advisor at your disposal.
- > You will receive an investment proposal tailored to your financial goals.
- > We will provide you with investment ideas.
- > We will recommend investment products based on their financial performance and management quality.
- > We will double check your orders prior to execution.
- > You will have access to our secure online platform for a detailed view of your portfolio and select articles on the latest economic and market developments.
- > We will monitor your investments to ensure they are in line with your financial objectives.
- > Your advisor will review your portfolio and personal situation with you once a year.



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For more information, visit
www.bcv.ch/en/bcvconseil

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