

WEALTH MANAGEMENT

BCV Conseil

Expert advice to help you make
the right investment choices



If you know enough about financial markets to manage your own portfolio, but would still like to draw on the expert advice of our investment professionals, then BCV Conseil is for you. Our range of advisory services lets you choose just the level of support you need to navigate today's markets and make sure you're on track for a sound financial future.

A dedicated advisor



You are unique, and so are your investment needs. That's why our BCV Conseil advisory services include a dedicated Private Banking advisor who will take the time to understand your investor profile and specific financial objectives. Whatever your goals are, our holistic approach to wealth management will help you reach them. Your advisor will look at your entire financial situation and point you in the right direction.

A range of advisory services

You can choose from four levels of advisory services, depending on the scope of investment advice you are seeking.

BCV Conseil Classique



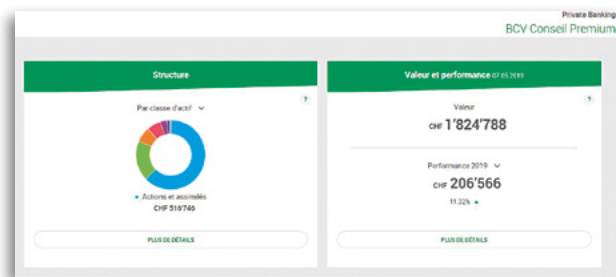
With BCV Conseil Classique, you will have a dedicated advisor who will send you investment ideas periodically. These ideas will be based on BCV's investment policy and will be in line with your investor profile. You will also be able to view your portfolio statement anytime through our online platform or by contacting your advisor.

BCV Conseil Plus



BCV Conseil Plus is for more experienced investors who wish to be in closer contact with their advisor and receive investment recommendations. You will also get reports from our market watch team summarising the latest economic and financial-market news. Our investment proposals will help you seize attractive opportunities while retaining a core portfolio that is aligned with your financial objectives. You will be able to view all this information and take investment decisions directly on our online platform.

BCV Conseil online platform



BCV Conseil Premium



BCV Conseil Premium is for our most demanding clients, who would like a fully personalised investment portfolio. You will receive specific analyses from our market watch team, and your dedicated advisor will be on hand to send you targeted investment proposals. We will also track portfolio risk daily and help you adjust your allocation when needed. All this information will be made available to you on our online platform.

BCV Active Advisory



BCV Active Advisory is for clients who keep a close eye on the financial markets. With this service, you can draw on the expertise of a BCV investment specialist in addition to your dedicated advisor. This specialist will contact you every week with investment proposals identified by our in-house team. BCV Active Advisory provides you with a team of experts who will guide your investment decisions and make sure you're on the right path to meet your financial goals.

BCV Conseil services	Classique	Plus	Premium	Active Advisory	
Investment advice from a dedicated advisor	●	●	●	●	
Investment ideas	●	●	●	●	
Investment proposals	●	●	●	●	
Online platform	●	●	●	●	
Analysis of your investments	●	●	●	●	
Systematic checks of market orders	●	●	●	●	
Review of your portfolio	●	●	●	●	
Market news and updates		●	●	●	
Investment opportunities with buy/sell recommendations		●			
BCV-selected investment products with preferential rates			●	●	
Information on individual securities			●	●	
Advice from our wealth planning experts			●		
Tax statements			●		
Regular investment reviews				●	
Dedicated investment specialist				●	
Fees*				Brokerage	Ticket Fee
Advisory service	0.10%	0.25%	0.50%	0.50%	1.10%
Minimum	CHF 250	CHF 600	CHF 5,000	CHF 3,000	CHF 8,000
Administration	0.25%	0.25%	0.25%	0.25%	0.25%
Transactions	20% discount	Ticket Fee	Ticket Fee	20% discount	Ticket Fee

*Speak with your advisor for more detailed information on fees



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

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