

INVESTMENT SOLUTIONS

BCV Conseil Classique



You have what it takes to manage your investment portfolio but would still like some expert advice. With BCV Conseil Classique, you will have a dedicated Private Banking advisor just around the corner who is there for you every step of the way. Your advisor will take the time to get to know you, understand your long-term goals, and then tailor their advice to your unique situation.

Your investment partner

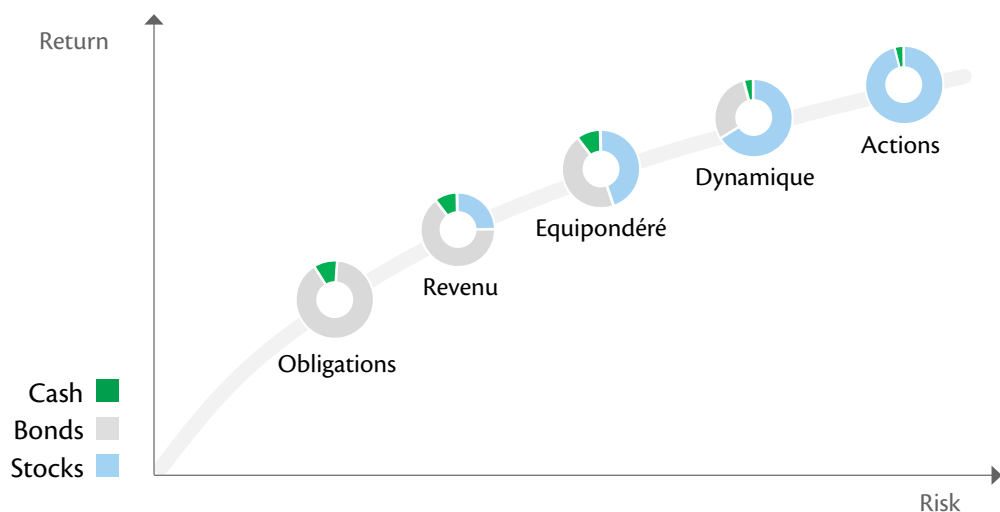
Our BCV Conseil Classique service lets you decide how involved you want to be in the day-to-day management of your portfolio. That means you can call on your Private Banking advisor whenever you need guidance on your investment decisions or if you would like to review your overall allocation's alignment with your financial goals. You will also have access to our online platform, where you will be able to view your portfolio and track its performance.

Risk management

To ensure you can invest with peace of mind, we will always double check your orders before executing them and periodically monitor your portfolio to ensure it is geared towards your investment objectives.

You will also enjoy maximum legal protection because you are treated as a non-qualified investor.

Asset allocation in line with your risk profile



Investment ideas

Your advisor will recommend diversified investment products that suit your profile. These asset allocation solutions are managed in line with BCV's investment policy.

We will also share personalized investment ideas with you – through your advisor or our online platform – on the basis of your investment goals.

Investment universe

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

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

Fees

The fee schedule for BCV Conseil Classique is simple, transparent, and competitive. It includes an advisory fee, a reduced administration fee for your securities account, and discounted 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.
- > We will monitor your investments to ensure they are in line with your financial objectives.
- > Your advisor will review your portfolio with you once a year.
- > You will have access to our secure online platform for a detailed view of your portfolio.



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

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