

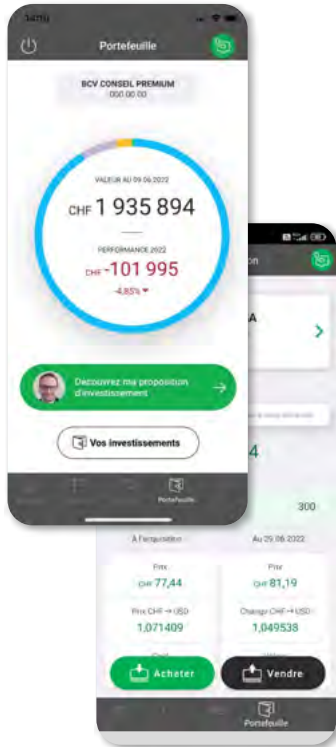
WEALTH MANAGEMENT

BCV Conseil Premium

Expert advice to help you make
the right investment choices



BCV Conseil Premium was designed for investors – like you – who set the bar high and want access to BCV’s full range of investment expertise. Our in-house investment specialists will provide you with bespoke services, coordinated by a dedicated and highly experienced Private Banking advisor. Your advisor will also send you targeted investment proposals and market research to help you achieve your investment goals.



Portfolio monitoring and risk management

We advise, you decide. We will provide you with a dedicated Private Banking advisor whom you can meet whenever you wish. Your advisor will present you with investment opportunities, which you can then take or leave as you see fit.

Targeted risk management is key to an effective advisory service. We will double check your orders before executing them, and we will analyze your portfolio every day to ensure it remains consistent with your objectives. We pay particular attention to your portfolio’s asset allocation, concentration risk, and currency exposure.

Bespoke wealth management

With BCV Conseil Premium, your advisor will work with you to build a diversified portfolio in line with your investment profile.

Investment universe

Our personalized recommendations consist of financial instruments that are carefully vetted and monitored by our investment specialists.

You will have access to a wide range of investment products (funds and structured products) from various asset management companies, including BCV. This approach offers greater asset diversification and a selection of the best products on the market.

With BCV Conseil Premium, you’re treated as a qualified investor, which means you will have access to a larger investment universe – often with reduced management fees.



Investment ideas

We will send you tactical investment ideas to help you boost your portfolio. At your request, your advisor can help you implement these ideas in your portfolio based on your financial goals.

You will also get the latest market and economic news from our financial strategists through interviews and reports. Your two points of contact for all portfolio-related information will be your advisor and our BCV Conseil online platform.

Investing in individual securities

With BCV Conseil Premium, you will have access to market information and financial analyses for individual Swiss and foreign securities. This service is separate from our investment recommendations.

Fees

The fee schedule for BCV Conseil Premium 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 an experienced Private Banking advisor at your disposal.
- > We will regularly send you personalized investment ideas.
- > You will receive investment proposals in line with your financial goals.
- > You will have access to our secure online platform for a detailed view of your portfolio.
- > We will conduct a daily analysis to ensure your investments are in keeping with your financial goals.
- > We will double check your orders prior to execution.
- > Your advisor will review your portfolio with you once a year and upon request.
- > You will have access to a universe of attractively priced investment products from various asset management companies, including BCV.
- > You will have access to information on individual Swiss and foreign securities.
- > You will have access to select articles on the latest economic and market developments.
- > You will receive a no-fee tax statement at the end of the year.
- > You will enjoy reduced fees on our wealth-management, tax-planning, and inheritance services.



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

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