

WEALTH MANAGEMENT

BCV Conseil Premium

Expert advice to help you make
the right investment choices



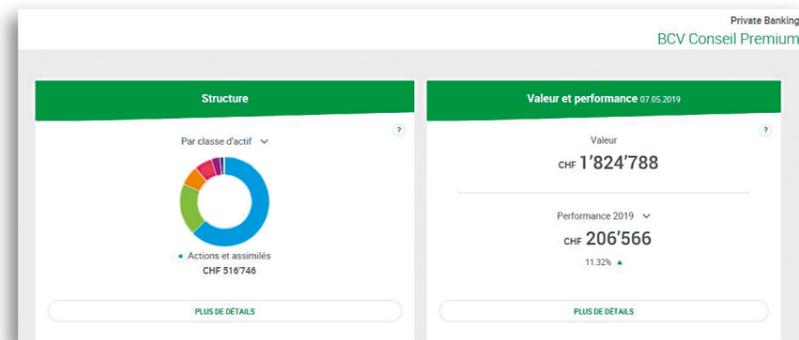
BCV Conseil Premium was designed for investors – like you – who set the bar high and want access to BCV’s full range of investment expertise. Our in-house investment specialists will provide you with bespoke services, coordinated by a dedicated and highly experienced Private Banking advisor. Your advisor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

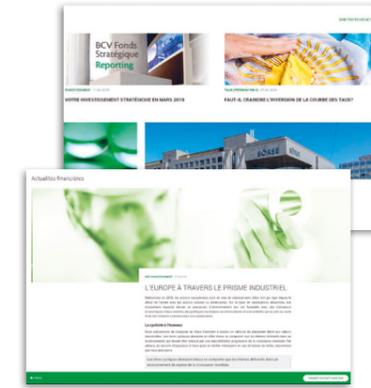
Targeted risk management is key to an effective advisory service. We will always double check your orders before executing them, and we will analyse your portfolio every day to ensure it remains consistent with your objectives. We pay particular attention to concentration risk, currency exposure and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

With BCV Conseil Premium, you are treated as a qualified investor, which means you will have access to a larger investment universe. If you prefer to be treated as a non-qualified investor so as to enjoy maximum legal protection, we can help you choose between our BCV Conseil Classique and BCV Conseil Plus advisory services.



Bespoke wealth management

With BCV Conseil Premium, you will be in direct contact with our investment specialists. They will work with you to build a portfolio that is aligned with your investment profile and your financial objectives. What’s more, you will be able to invest in attractively priced investment vehicles that are handpicked in line with BCV’s investment strategy.



Investment ideas

We will help you fine-tune your portfolio by proactively sharing personalised investment themes with you based on your investment objectives. 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 information on individual securities that BCV has handpicked. Together with your advisor, you can draw on this universe to map out the investment themes we share with you.

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, attractive flat-rate transaction fees and the lowest fees possible on the investment vehicles we propose.

Benefits

- > You will have an experienced Private Banking advisor at your disposal.
- > You will regularly receive personalised 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 attractively priced investment vehicles selected by BCV.
- > You will have access to information on individual securities tracked by BCV.
- > You will receive relevant articles as well as specific analyses written for you about the latest economic news 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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