

WEALTH MANAGEMENT

BCV Active Advisory

Expert advice to help you make
the right investment choices



You are an active investor and highly attuned to the financial markets but would still like to have a bespoke advisory service at your fingertips. BCV Active Advisory is the ideal solution tailored to meet your unique needs. In addition to a Private Banking advisor, you will have a dedicated Active Advisory investment specialist who will provide you with the expert support you need to make the right investment decisions.

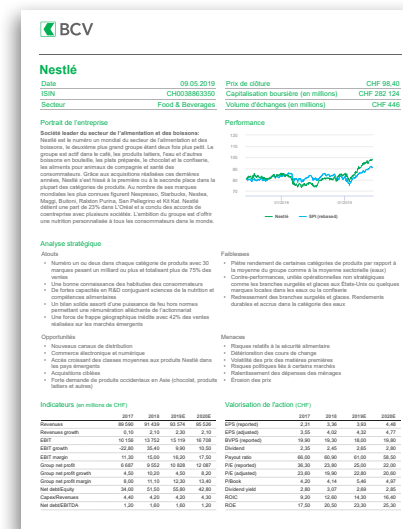
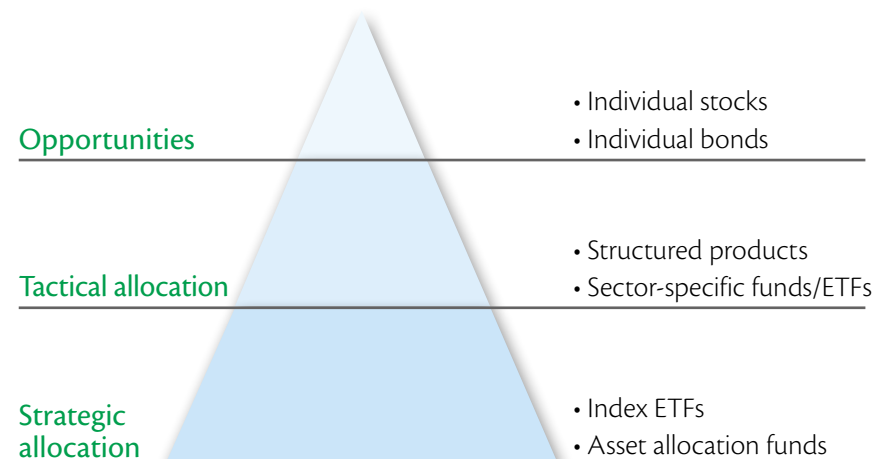
Dedicated investment specialist

BCV's investment experts live and breathe the financial markets. Your dedicated specialist will put that knowledge to work for you and personally monitor your portfolio. To help you achieve your financial objectives, we will regularly send you investment opportunities, which you can then take or leave as you see fit. What's more, you can reach out to your dedicated specialist as often as you wish between 8am and 6:30pm, from Monday to Friday.



Guidance in your asset allocation

Our Active Advisory approach, which is guided by BCV's investment strategy and our allocation pyramid, meets the needs of even the most demanding investors. We start by looking at your portfolio's core holdings, which form the base of our allocation pyramid. Our aim is to ensure that the bulk of your portfolio is structured in line with BCV's economic scenario. For the middle, tactical part of the pyramid, we will send you investment themes that are consistent with both our core scenario and your investment profile. These themes are based on products that ensure good risk diversification.



Investing in individual securities

With BCV Active Advisory, you will also be able to tap into a universe of individual securities handpicked by BCV. This universe represents the opportunity-driven peak of our allocation pyramid and consists of shares in 50 Swiss companies together with 130 securities from the main markets outside Switzerland. You can also set up alerts for securities in this universe so that you can act quickly when investment opportunities arise.

Portfolio monitoring and risk management

Your partnership with BCV will be twofold. In addition to having frequent contact with your dedicated investment specialist, you will be able to count on comprehensive support from your Private Banking advisor – whom you can meet with whenever you wish. Your advisor will also be there to help you manage portfolio risk: we will double check your orders before executing them and regularly monitor your investments to ensure they are aligned with your objectives, particularly in terms of asset allocation, currency breakdown and concentration risk.

With BCV Active Advisory, 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.

Fees

The fee schedule for BCV Active Advisory is simple, transparent and competitive. We offer two pricing models, which include an advisory fee, a reduced administration fee for your securities account, and either discounted transaction fees or a flat-rate transaction fee.

Benefits

- > You will have a Private Banking advisor at your disposal.
- > You will have constant decision-making support from a dedicated investment specialist.
- > You will receive very frequent recommendations driven by our investment ideas and your financial objectives.
- > You will have access to a universe of individual securities tracked by BCV.
- > We will double check your orders prior to execution.
- > We will regularly analyse whether your investments are in keeping with your financial objectives.
- > Your advisor and investment specialist will review your portfolio with you upon request.



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www.bcv.ch/en/home

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

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