

# INVESTMENT ADVISORY SERVICE

Focussed and professional

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**Your Bank,  
your values**

Focussed and professional

## Work with us to determine the investment strategy most suited to you

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Are you looking for a Bank that listens to you and understands your needs and expectations?

With BPS (SUISSE), you can always rely on a trusted partner who won't leave you in the lurch in the face of market uncertainties. Our aim is to focus on your needs and identify solutions that stand the test of time and satisfy your requirements.

Because every personal need comes about in a specific context, in a family and professional situation that's different for everyone and unique to each and every one of you.

Our advisors can provide you with a personalised and proactive advisory service. With the support of Investment Advisory specialists, we will design investment solutions to satisfy even the most complex of your needs.



## Making clients top priority

### Dynamic advisory model

BPS (SUISSE) collaborates with clients to implement their projects, contributing expertise and experience.

The BPS (SUISSE) advisory model comprises five phases – which interact dynamically with one another – to offer a meticulous and continuous service, researching the most suitable investment strategy.

- 1. Identifying needs and risk profile**  
Becoming well-acquainted with the client's personal objectives and needs in order to gain a complete overall picture of their financial situation and personal circumstances. Identifying their needs and expectations are decisive factors when it comes to putting together the personal risk profile.
- 2. Defining the investment strategy**  
Working with the personal financial advisor to formulate and develop a bespoke strategy based on a client's individual risk profile.
- 3. Analysing and portfolio proposing**  
Proposing a solution in line with the chosen investor profile. The final decision – about whether to accept, refuse or amend the individual investment proposals – is always in the hands of the client.
- 4. Implementing the strategy**  
Implementing the agreed strategy with the utmost transparency and in full compliance with the client's individual needs.
- 5. Monitoring and optimising the portfolio on an ongoing basis**  
Regularly checking the portfolio against the agreed objectives. In the event of deviations, the client will be notified promptly and be provided with a selection of suitable proposals compatible with their risk profile. BPS (SUISSE) advisors are always on hand to provide you with information on developments and portfolio activity.



## Varied solutions

### A broad range of solutions to suit all needs

BPS (SUISSE) proposes a range of products and services to satisfy all investment needs, including by integrating elements that take sustainability into account.

Our advisors know how to identify the most appropriate solution to achieve your personal objectives, including ESG (Environmental, Social, Governance) investments. Contact them to find out more.

#### Investment fund savings plans

To save in a systematic, gradual and flexible way.

##### BENEFITS

- Access to investment funds, starting from small amounts
- Flexible participation in financial markets with a reduced portfolio risk, benefiting from reduced commission
- Low-cost diversification of savings.

Visit the dedicated page on our website.

#### Financial advisory service

To benefit from the competence and professionalism of our Investment Advisory consultants and specialists.

##### BENEFITS

- In addition to its dedicated consultants, you get free of charge:
- BPS (SUISSE) securities lists
  - The tax statement at the end of the year
  - An Investment Advisory Service specialist for an annual portfolio review and optimisation meeting.

Visit the dedicated page on our website.

#### Advisory Professional

Tackle global financial markets with an experienced professional at your side.

##### BENEFITS

- Proactive and personalised advice for investment objectives pursued
- Professional assistance with investment decisions thanks to a Quick execution of agreed investment instructions
- Constant overview of the portfolio by the manager and prompt streamlining of the strategy.

Visit the dedicated page on our website.

For those who prefer to invest in investment funds, BPS (SUISSE) offers a wide selection of Popso (Suisse) Investment Fund SICAV funds, a varied range that includes different investment strategies and multiple opportunities to combine products for solutions of efficient and well diversified savings and investment.

Take a look at the dedicated website:  
[www.popsofunds.com](http://www.popsofunds.com)



**POP SO** (SUISSE)  
INVESTMENT FUND SICAV



Visit the Investment Advisory Service section on our website.

#### Terms and conditions in force as of 1 October 2022.

The Bank reserves the right to make changes at any time to the mandates set out herein and the relevant terms and conditions, which can be read under "Tariff for Investment Products and Services" on our website [www.bps-suisse.ch](http://www.bps-suisse.ch). This publication is intended for information purposes only and does not constitute an offer and is in no way a substitute for the qualified advice required prior to any purchase decision, especially in relation to the risks associated with it.

Therefore, it is the duty of the individual investor to consult his/her financial advisor. The financial products described here are not intended for persons subject to a jurisdiction that limits or prohibits their distribution from Switzerland.

