



# COMFORT investment package

## Professional asset management by investment specialists

### Your requirements

You do not want to engage with financial market developments on a day-to-day basis. You decide on your personal investment strategy together with your client advisor. However, you delegate investment implementation and the systematic monitoring of your portfolio to our experienced investment specialists. Which means you can sit back and relax.

Find the mandate that best suits your requirements.

➔ [sgkb.ch/mandate](https://sgkb.ch/mandate)

### Your advantages

- You determine the desired strategy and the appropriate mandate type together with your client advisor
- You trust an investment solution that involves our experience investment specialists actively looking after your assets
- You benefit from our market forecasts, which are implemented on a fiduciary basis
- You have a choice between an attractive flat-rate price or a performance-dependent price
- Greater security thanks to regular, transparent reporting
- e-tax statement included

### Advice and support

- Personal client advisor
- Careful clarification of your investment needs, knowledge and experience
- Determination of the investment strategy that is right for you
- Selection of appropriate mandate solution
- Regular, one-to-one performance discussions

### Portfolio and risk monitoring

Daily systematic monitoring by investment specialists

### Portfolio management

- Strategy-compliant mandate management by investment specialists
  - Tactical strategy changes
  - Analysis and assessment of individual securities
  - Rapid response to market changes

### Research and financial analysis

- Market analyses under ➔ [sgkb.ch/enews](https://sgkb.ch/enews)
- Monthly “CIO Talk” telephone conference

### Securities portfolio services

- Administration of your securities
- Detailed asset statement with performance details and portfolio analysis
- Interactive asset statement and portfolio performance in the SGKB App

# COMFORT price overview

Package price dep. on account and portfolio value (CHF equivalent)		Package price or performance-dependent price See price table p. 5–7
<b>Transaction prices</b>	Unrestricted number of cost-free transactions	Included
<b>Securities portfolio services</b>	<ul style="list-style-type: none"> <li>– Detailed asset statement with performance details and portfolio analysis</li> <li>– List of transactions</li> <li>– E-tax statement Switzerland<sup>1</sup></li> <li>– Tax statement abroad<sup>2</sup></li> <li>– Reclaiming of Swiss withholding tax<sup>2</sup></li> <li>– Reclaiming of tax at source</li> </ul>	<ul style="list-style-type: none"> <li>Included</li> <li>Included</li> <li>Included</li> <li>Included</li> <li>See price table p. 15</li> </ul>
<b>Other services</b>	– Account management / postage fees / agio / disagio	Included
<b>Third-party payments</b>	– Sales remuneration for investment funds	Comprehensive reimbursement
<b>Pensions and financial planning</b>	<ul style="list-style-type: none"> <li>– Pension analysis</li> <li>– Financial planning</li> <li>– Inheritance advice</li> <li>– Estate distribution and execution of wills</li> <li>– Tax returns</li> <li>– Tax advice</li> </ul>	See price table p. 14

<sup>1</sup> Only for clients domiciled in Switzerland.

<sup>2</sup> For clients domiciled in countries that have a double taxation agreement with Switzerland. Minimum reclaim amount CHF 10.

The complete price table Services and prices for investment transactions can be found at [sgkb.ch](https://www.sgkb.ch).

## Do you have any questions?

We'll be happy to help:

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