



## Our Advisory Mandate

### The best in investment advice

If you follow events on the worldwide markets with great interest and are active yourself.

The Investment Advisory Mandate makes it possible for you to have regular discussions with your portfolio manager.

- Your Investment Advisor is always at your side, acting as a trusted person to whom you can turn with any investment questions.
- We evaluate your portfolio risks at the beginning of the advisory service and then perform a regular follow up. Where appropriate, you receive individual recommendations to adjust your portfolio.
- In addition, you receive ad hoc information about the immediate risks within your portfolio and in the financial markets.
- Furthermore, you have access to the very best investment ideas, which are identified every week by our network of brokers.
- As your goals and requirements can change, we continually implement your wishes with suitable investments.
- You make the final investment decisions yourself.

### Your advisory Mandate

You make selective decisions about new investments.

Your Investment Advisor provides targeted information about opportunities and risks.

The Advisory Mandate supports you in particular with risk monitoring.

It gives you full freedom in making selections and at the same time we always back you up with analyses and advice.

All the trades made for your account have to be confirmed by either mail or by phone at earliest.

### Systematic monitoring of risks in the context of your portfolio

- Your Investment Advisor analyses your investment portfolio at the start of the advisory service
- Then regularly thereafter, thus ensuring your investment goals and risk profile remain aligned.
- We inform you promptly about risks that arise in your portfolio and about developments in the financial markets.
- You receive tailored suggestions to adjust your portfolio with investment solutions from the open product range.
- You make your own investment decisions and retain flexibility.