



Discretionary management made easy - invest money, let it work and withdraw flexibly

EasyInvest is discretionary management with a personal investment strategy that is suitable for investing money or as a payout plan. You benefit from a comprehensive investment service and don't need any financial knowledge. You can access your assets online whenever you like and easily make any adjustments.

What does EasyInvest discretionary management offer you?

Your personal investment strategy

- Your investment strategy is customized for you and tailored to your individual risk tolerance and earnings expectations.
- You can broadly diversify how your money is invested through different investment classes, including shares, bonds, real estate and precious metals.

High flexibility

- You can adjust your individual investment strategy whenever you want at no cost.
- You can make deposits and withdrawals flexibly online.
- You can select or turn off all services easily online.
- You can use express orders to make adjustments and withdrawals particularly quickly.

Securing your investment strategy

We systematically monitor and automatically rebalance your investment portfolio to ensure that your investment strategy is complied with.

Selected actively and passively managed funds and exclusive conditions

- Efficient mix of affordable ETFs and actively managed investment funds of first-class providers (selected using best-in-class approach)
- Investment funds selected, monitored and exchanged by AXA finance experts
- Guaranteed low fund costs, optimized performance and good investment management

24/7 online access to your assets

The customer portal gives you round-the-clock and direct online access overall to your EasyInvest discretionary management. You can:

- find out about the status and performance of your assets as well as the costs of your investment
- carry out easily and free of charge simulations on earnings opportunities and risks of your investment
- make various adjustments simply as part of our self-services

Optional services

Investment management

We reduce the risks of poor investment timing for you thanks to the staggered investment of your deposit. Your deposit will be equally distributed and invested in securities on a monthly basis over the period you have selected.

Payout plan

The payout plan allows you to have part of your assets paid out every month. You can specify the amount and determine the date from which we are to regularly transfer this amount to you.

Express orders

You have an express option if you need to speed things up.

You maintain control

and can change your investment mix online whenever you like and at no charge.

Favorable investment terms and conditions

You invest on the same terms and conditions as professional investors, such as pension funds.

Your assets are always available

and can be flexibly withdrawn. You can give notice to terminate your contract at any time.

Investment management

Thanks to staggered investment, we reduce the risk of poor investment timing for you.

Payout plan

You receive a regular payout - you determine the period and amount.

Tax statement

You receive a fully prepared tax statement free of charge.

EasyInvest discretionary management - facts and figures

Costs	<p>Fees for discretionary management</p> <ul style="list-style-type: none"> Investment fee: 1.25 % of the investment plus VAT Administration costs: 0.80 % of assets per year plus VAT (charged quarterly) <p>Third-party costs</p> <p>Product costs for funds/ETFs (TER): approx. 0.40 % of the securities credit balance.</p> <p>There are no issuing fees, redemption commissions or retrocessions. Transactions are subject to federal stamp duty (0.075 % and 0.15 %).</p> <p>Additional costs for express orders</p> <p>CHF 200 per order.</p>
Minimum amounts for deposits and payouts	<p>Minimum portfolio value: CHF 7,500</p> <p>Minimum portfolio value for a payout plan: CHF 30,000</p> <p>Deposits: from CHF 1</p> <p>From amounts of CHF 500, the cash credit balance is invested in your investment assets.</p> <p>Payouts: from CHF 500</p>
Contract term	No minimum term
Execution days	<p>To achieve maximum cost efficiency for you, we group together the securities transactions of all customers and execute them once a week.</p> <p>Mondays:</p> <p>Investments, disposals, adjustments to investment strategy, restoration of your chosen investment mix (rebalancing, on the last Monday of the month only)</p> <p>Fridays:</p> <p>Payouts for cash investments, payouts under payout plans, on Fridays before the last Monday in the month</p>
Offer partner	<p>Asset manager: AXA Insurance Ltd.</p> <p>Custodian bank: Bank CIC (Switzerland) AG</p>



Your advantages with EasyInvest discretionary management

- Your personal investment strategy
- Control at all times over your invested money
- Transparent cost reporting
- Payout plan with regular additional income for a specific period



Determine your individual investment mix:
[AXA.ch/en/easyinvest](https://www.axa.ch/en/easyinvest)

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