Evaluation

	Provider A	Provider B	Provider C	Provider D
Type of Financial Partner				
No preference.	0	0	0	0
My Role				
I delegate the management of my assets.	+	+	+	+
Scope of Advice				
The advice should be comprehensive and include the following topics:				
Pension advice.	+	+	+	+
Asset Allocation Ranges				
I prefer an active investment that does not deviate too far from the specified range (benchmark-oriented).	+	+	+	+
Second Pillar (of the Swiss Pension System)				
Yes.	+	+	+	+
Investment Instruments				
Stocks, bonds.	+	+	+	+
Commodities and precious metals.	+	+	+	+
Hedge funds.	+	-	+	+
Private equity.	+	+	+	+
Crypto assets.	+	+	+	-
Priorities				
Transparent, easy-to-understand pricing. -> 3 Points	0	0	+	+
Low overall costs. -> 5 Points	(+)	(+)	(+)	0
High (historic) performance. -> 6 Points	+	+	+	+
Independent advice (i.e. basically no in-house products). -> 2 Points	(+)	+	+	+
Sustainable investments. -> 2 Points	+	(+)	+	(+)
Advisor with few clients and enough time for me. -> 1 Point	0	0	-	+
High rating or high equity ratio. -> 1 Point	+	+	0	0
Advisor Preference				
Gender doesn't matter, older than 50 years, 40-50 years	+	+	-	+

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Evaluation

	ProviderA	ProviderB	ProviderC	ProviderD
Investable Assets				
CHF 1,000,000-4,999,999.	+	+	+	+
Reason for changing				
No prior experience with private banking.				
Total matching points	**275**	**265**	**255**	**240**

Legend

+	Requirement is fully met.
(+)	Requirement is met with certain restrictions.
0	Requirement is neutrally or not evaluated.
-	Requirement is not fulfilled.

Matching points:

The maximum number of points that can be achieved varies greatly depending on your profile. For this reason, we are unable to provide an evaluation with a percentage score here. However, the values displayed will give you an indication of whether the best providers for you are close together or far apart in terms of meeting your requirements.

You will receive details on the evaluation categories and further information in a personal consultation.

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