



# Portfolio Advisory Services

Expert level: Your benefits

## INVESTMENT DIALOGUE & PORTFOLIO SERVICES

Access to personal Client Adviser	✓
Access to dedicated Investment Adviser	✓
Initial portfolio review	✓
Comprehensive strategic & tactical review to optimize portfolio allocation	Up to 4 x per year
Comprehensive Advisory framework	✓
Investment strategies based on risk assessment and individual needs	✓

## INVESTMENT IDEAS

Customized investment strategies	✓
Proactive investment dialogue	✓
Thematic-based opportunities	✓

## STRATEGY CONTENT

Monthly market reviews, Mosaique (House) Views	✓
Market Perspectives, Strategy blogs	✓

## REPORTING & RISK MONITORING

Ongoing portfolio monitoring	✓
Standard investment report: investments and performance	Up to monthly
Comprehensive suitability and health checks framework relevant to investment objectives	✓

## DIGITAL CAPABILITIES

E-Access and App: digital reporting	✓
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