



Portfolio Advisory Services

Partner level: Your benefits

INVESTMENT DIALOGUE & PORTFOLIO SERVICES

Access to personal Client Adviser	✓
Initial portfolio review	✓
Comprehensive strategic review to optimize portfolio allocation	1 x per year
Comprehensive Advisory framework	✓
Investment strategies based on risk assessment and individual needs	✓

INVESTMENT IDEAS

Investment ideas across main asset classes	✓
Thematic-based opportunities	✓

STRATEGY CONTENT

Monthly market reviews, Mosaique (House) Views	✓
Market Perspective, 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	✓
-------------------------------------	---
