NEUE BANK

PRIMUS
Advice

You make your investment decisions independently and flexibly, without sacrificing regular monitoring of your portfolio and our tailored investment recommendations.

Is this your investor type? You...

- follow political and financial market developments.
- would like regular exchanges with your personal investment / client adviser.
- value our advice in the determination and selection of the investment strategy corresponding to your investor profile.
- achieve your personal investment goals by implementing and adhering to the appropriate investment strategy.
- would like tailored investment recommendations, for instance when the strategy is breached.
- make your investment decisions yourself, without wanting to do without our advice.
- rely on our suitability check for your buy and sell decisions.
- rely on our regular portfolio monitoring to reduce your investment risks.
- always keep track of your assets and performance.
- benefit from attractive conditions and discounted additional services.

Details

Investment style	strategy-based approach, implementation using individual / collective investments
Investment strategy	based on individual investor profile, selection among Fixed Income, Income, Balanced, Dynamic, and Equities strategies
Portfolio monitoring	monthly monitoring of adherence to strategic asset allocation and identification of concentration risks, without monitoring of currency exposures
Portfolio analysis	at client request (50 % discount on one portfolio analysis per year)
Communication	post, e-banking, email, fax, telephone
Reports	included: asset statement with performance calculation, sustainability fact sheet, loss threshold and cost transparency report (MiFID II)
	at client request: sustainability report, tax report / earnings statement (50 % discount on each report)
Fee model	individual fee model (standard) or flat fee model (at client request)
Asset amount	no minimum amount

PRIMUS **Advice**

Advice and client support	Our services
Personal support by investment / client adviser	personal investment and client adviser
Comprehensive financial / wealth consulting	yes
Strategy-based investment / wealth consulting	yes
Portfolio management by asset management specialist	–
Suitability check for buy / sell orders (advisory minutes)	transaction-specific
Access to specialists	yes

Monitoring and reporting

Frequency of portfolio monitoring	monthly
Monitoring of strategic portfolio allocation	yes
Monitoring of tactical portfolio allocation	–
Portfolio analysis	50 % discount once a year
Asset and performance statement	quarterly / yearly
Sustainability report	fact sheet yearly
Other statements / reports (incl. comprehensive sustainability report) and discounts	50 % discount on statements / reports and 10 % discount on financial planning

Investment and market information

Strategy-based investment proposals	yes
Individualised investment strategy and specifications	–
Proactive tactical investment ideas and recommendations	–
Tactical asset allocation using NEUE BANK traffic light	–
Incorporation of sustainability and social aspects	–

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