



# NEUE BANK

## PRIMUS Advice Plus

You have your finger on the pulse of the financial markets and actively manage your portfolio on your own responsibility. We support you as a professional sparring partner, monitor the development of your assets, and share our opinion with you on an ongoing basis.

### Is this your investor type? You...

- have your finger on the pulse of the financial markets and always keep track of developments.
- would like intensive exchanges with your personal investment adviser on current market events.
- are looking for a professional sparring partner who proactively gives you suitable recommendations on market opportunities.
- want to hold the reins yourself and make your own investment decisions.
- value our advice on tactical asset allocation.
- would like support and a second opinion for the implementation of your investment ideas.
- achieve your personal investment goals by taking account of individual aspects.
- are active and rely on our suitability check for your buy and sell decisions.
- value ongoing portfolio monitoring to reduce your investment risks.
- benefit from attractive flat fees and discounted additional services.

### Details

<b>Investment style</b>	active approach to make use of opportunities, implementation using individual / collective investments
<b>Investment strategy</b>	based on individual investor profile, selection among Fixed Income, Income, Balanced, Dynamic, and Equities strategies, option to implement individualised investment strategy
<b>Portfolio monitoring</b>	daily monitoring of adherence to strategic asset allocation and identification of concentration risks, including monitoring of currency exposures
<b>Portfolio analysis</b>	at client request (100 % discount on one portfolio analysis per year)
<b>Communication</b>	post, e-banking, email, fax, telephone
<b>Reports</b>	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 (100 % discount on each report)
<b>Fee model</b>	individual fee model (standard) or flat fee model (at client request)
<b>Asset amount</b>	no minimum amount

## PRIMUS Advice Plus

### 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	daily
Monitoring of strategic portfolio allocation	yes
Monitoring of tactical portfolio allocation	–
Portfolio analysis	free of charge once a year
Asset and performance statement	quarterly/ yearly
Sustainability report	fact sheet yearly
Other statements/ reports (incl. comprehensive sustainability report) and discounts	100 % discount on statements/ reports and 20 % discount on financial planning

### Investment and market information

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