

Overview

Advisory models

PRIMUS Advice

Classic investment advice with strategy monitoring for long-term investors.

PRIMUS Advice Plus

Customised advisory model for professional investors with their finger on the pulse of the markets.

Advice and client support



Monitoring and reporting



Investment and market information



- Personal advice and client support
- Selection of five different investment strategies
- Customised investment proposals
- Regular portfolio monitoring
- Incorporation of sustainability and social aspects
- Comprehensive performance reporting
- Attractive conditions with additional discounts

- Personal advice and client support
- Selection of five different investment strategies
- Access to investment specialist
- Customised investment proposals
- Ongoing portfolio monitoring
- Information on tactical asset allocation using Neue Bank traffic light
- Proactive recommendations on market opportunities
- Incorporation of sustainability and social aspects
- Comprehensive performance reporting
- Attractive flat fee with many additional discounts



	PRIMUS Advice	PRIMUS Advice Plus
Advice and client support		
Personal support	Personal adviser	Personal adviser and investment specialist
Comprehensive financial / wealth advice	yes	yes
Strategy-based investment / wealth advice	yes	yes
Monitoring and reporting		
Monitoring of strategic portfolio allocation	yes	yes
Monitoring of tactical portfolio allocation	–	yes
Portfolio analysis	50 % discount once a year	free of charge once a year
Asset and performance statement	quarterly / yearly	quarterly / yearly
Sustainability offerings	yes	yes
Other statements / reports (incl. comprehensive sustainability report) and discounts	100 % discount on statements / reports and 10 % discount on financial planning	100 % discount on statements / reports and 20 % discount on financial planning
Investment and market information		
Strategy-based investment proposals	yes	yes
Customised investment strategies and specifications	–	yes
Proactive tactical investment ideas / recommendations	yes	yes
Information on tactical asset allocation using Neue Bank traffic light	–	yes
Incorporation of sustainability and social aspects	yes	yes

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