



Invest money, let it work and withdraw flexibly

EasyInvest is discretionary management with a personal investment strategy that is suitable for investing money or as a payout plan. You benefit from a comprehensive investment service and don't need any financial knowledge. You can access your assets online whenever you like and easily make any adjustments.

What EasyInvest discretionary management offers you

Your personal investment strategy

Your investment strategy is customized for you and tailored to your individual risk tolerance and earnings expectations. You can invest your money in various investment classes in a broadly diversified way.

High flexibility

You can amend your investment strategy for free whenever you like, make deposits and withdrawals and activate or deactivate optional services.

Securing your investment strategy

We systematically monitor and automatically rebalance your investment portfolio to ensure that your investment strategy is complied with.

Selected funds and exclusive conditions

We offer you an efficient mix of affordable ETFs and actively managed investment funds from high-profile providers. The investment funds are selected, monitored and exchanged where necessary by our financial experts. They also guarantee favorable fund conditions.

24/7 online access to your assets

The customer portal gives you round-the-clock online access to your EasyInvest discretionary management.

You can:

- find out about the status and performance of your assets as well as the costs of your investment
- carry out easily and free of charge simulations on earnings opportunities and risks of your investment
- make various adjustments simply as part of our self-services

Your advantages at a glance



- Favorable investment terms and conditions and transparent cost reporting
- Investment mix can be adjusted online at any time
- Investments always remain available
- Free schedule for tax declaration

Optional services

Investment management

We reduce the risks of poor investment timing for you thanks to the staggered investment of your deposit. The first tranche is normally invested on the Monday following receipt of the payment. The rest is then spread across the remaining tranches, each of which is invested at the end of the respective month.

Payout plan

The payout plan allows you to have part of your assets paid out every month. You can specify the amount and determine the date from which we are to regularly transfer this amount to you.

Express orders

You have an express option if you need to speed things up.

EasyInvest discretionary management - facts and figures

Costs

Fees for discretionary management

- Investment fee: 1.25 % of the investment plus VAT
- Management costs: dependent on credit balance (three-month average)
 - below CHF 100,000: 0.80 % of credit balance p.a.
 - from CHF 100,000: 0.75 % of credit balance p.a.
 - from CHF 250,000: 0.70 % of credit balance p.a.
 - from CHF 500,000: 0.65 % of credit balance p.a.

Third-party costs

Product costs for funds/ETFs (TER): approx. 0.37 % of the securities credit balance.

There are no issuing fees, redemption commissions or retrocessions.

Transactions are subject to federal stamp duty (0.075 % and 0.15 %)

Additional costs for optional express orders

CHF 200 per order

Minimum amounts for deposits and payouts

Minimum portfolio value: CHF 7,500

Minimum portfolio value for a payout plan: CHF 30,000

Deposits: from CHF 1

From amounts of CHF 500, the cash credit balance is invested in your investment assets.

Payouts: from CHF 500

Contract term

No minimum term, can be terminated at any time

Execution days

To achieve maximum cost efficiency for you, we group together the securities transactions of all customers and execute them once a week.

Mondays:

Investments, disposals, adjustments to investment strategy, restoration of your chosen investment mix (rebalancing, on the last Monday of the month only)

Fridays:

Payouts for cash investments, payouts under payout plans, on Fridays before the last Monday in the month

Offer partner

Asset Manager:

AXA Insurance Ltd

Custodian bank:

Bank CIC (Switzerland) AG



Determine your individual investment mix:
[AXA.ch/easyinvest](https://www.axa.ch/easyinvest)

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