

Product description

Fund self-service

With fund self-service, you use the PostFinance infrastructure. Invest your money independently in selected funds according to your own wishes.

At a glance

You are investing independently according to your own wishes and do not need any advice.



Advice and services



Individual investment strategy



Portfolio monitoring



Access to market view



Your investment needs

You are an investment expert and want to invest in funds independently. You do not need any advice from PostFinance.

The advantages for you

- You will benefit from a straightforward range of funds put together by our experts. This consists exclusively of PostFinance Funds and selected third-party funds.
- Amongst our third-party funds, you will be able to choose from funds that focus on various countries, sectors and themes, including technology and sustainability.
- With a funds saving plan, you can invest small amounts of money into selected funds on a regular basis.
- You receive your e-tax statement “electronically” in e-finance or by post, free of charge. This allows you to import the relevant data with ease into your cantonal tax authority’s tax declaration software or to transfer it manually.

An overview of the most important services

Advice and services

Processing of transactions and custody account management ✓

Custody account statement Semi-annually

E-tax statement (Switzerland) ✓

Funds saving plan ✓

Fund withdrawal plan ✓

Our market view

Access to market analyses ✓

Purchase and usage channels

Online¹ and in branch ✓

¹ An e-finance login is required for the online channel.

Prices and conditions

Fees ²	Information on the fees can be found in the price list for investment solutions at postfinance.ch/investment-information .
Sales remuneration	Yes, already included in the fund costs for the individual instruments (see <i>Factsheet: costs and sales remuneration in the "Fund self-service" and "Fund consulting basic" investment solutions</i> at postfinance.ch/investment-information).
Minimum amount per fund (initial investment)	CHF 2,000
Minimum amount per fund (follow-up investment or redemption ³)	CHF 100
Minimum amount for recurring investment via funds saving plan	CHF 20
Securities deliveries to third-party banks	Not possible for PostFinance Fonds

² Debited from the reference account.

³ Redemption also possible via fund withdrawal plan.

Disclaimer

This information and these statements are for information purposes only and do not constitute either an invitation to tender, a solicitation, an offer or a recommendation to subscribe to a service, to buy or sell transactions for any securities or other financial instruments, or to perform other transactions. This information does not take into consideration the specific or future investment goals, financial or tax situation or particular needs of any specific recipient, and is therefore not a suitable basis for investment decisions. We recommend that you consult your financial or tax advisor before every investment. The price, value and return of investments may fluctuate. Investment in financial instruments is subject to certain risks and does not guarantee the retention of the capital invested or an increase in value. All investment services and financial instruments provided by PostFinance Ltd are unavailable to US persons and other persons whose domicile or tax liability is outside of Switzerland and will therefore neither be offered nor sold/provided to them.

You can find our range of funds at postfinance.ch/fundrange.
More information about the range can be found at postfinance.ch/funds.

PostFinance Ltd
Mingerstrasse 20
3030 Bern
Switzerland

Telephone +41 58 448 14 14
www.postfinance.ch