

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.

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 Fonds 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.

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



An overview of the most important services

Advice and services	
Processing of transactions and custody account management	✓
Custody account statement	Semi-annually
Swiss tax statement	Subject to a fee. Available for order until the end of February.
Funds saving plan	✓
Fund withdrawal plan	✓
Our market view	
Access to market analyses	✓
Purchase and usage channels	
Online ¹ and in branch	✓

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

² Debited from the reference account.

³ Plus VAT.

⁴ Redemption also possible via fund withdrawal plan.

Prices and conditions

Custody account fees ^{2,3}	0.15% p.a. on the average custody account assets. Transaction fees, other price positions and 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 ⁴)	CHF 100
Minimum amount for recurring investment via funds saving plan	CHF 20
Securities deliveries to third-party banks	Not possible for PostFinance Fonds

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

Disclaimer

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