

# Voucher for a free portfolio analysis worth CHF 1000.—



Send us your portfolio statements.

We would be happy to help you save costs and optimize performance!

You will receive:

- Opportunity and risk analysis
- Analysis of portfolio structure
- Financial standing analysis
- Fiscal optimization
- Security strategies
- Analysis of individual shares (technical/fundamental)
- Liquidity management
- Suggestions on cost reduction
- Suggestions on increasing performance

We need:

- In order to produce a serious and detailed portfolio analysis, we need copies of your current security deposit statements. Please use the envelope provided.
- The name of the custodian bank as well as your account number may be covered up. Thus anonymity and discretion is guaranteed.

Sender:

Surname: .....

First name: .....

Company: .....

Street / no.: .....

Postcode / town / country: .....

Phone: .....

E-Mail: .....

- Yes, I would like to benefit from your portfolio analysis.**  
(Portfolio statements are enclosed)

You will receive your individual analysis within 14 days. This suggestion for optimizing your assets is not binding and does not include any obligations on your part. Your documents will be treated confidentially and with discretion by our company.