



# Julius Bär

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## DIRECT INVESTMENT ADVISORY MANDATE INTEGRATED ADVISORY SERVICES TAILORED TO YOUR REQUIREMENTS

### Value added at your discretion

With the direct Investment Advisory Mandate you receive an exclusive service with personalised investment advice in a portfolio context. It gives you access to your personal investment advisor with whom you decide when, where, how often and in which situations you want to be contacted and involved.

You benefit from an active monitoring of your portfolio and receive proactive suggestions for optimising it on an ongoing basis. Our specialists will offer you solutions tailored to your investment needs and goals – based on our investment process.

### You determine the level of interaction

The direct Investment Advisory Mandate allows you to invest proactively rather than simply reacting to global financial markets:

- You have access to investment ideas identified by our global network of more than 80 investment advisory experts in a weekly investment process.
- Initially and then every six months we conduct a comprehensive and detailed review of the risks embedded in your portfolio, making recommendations for specific changes where necessary.
- You receive ad hoc information about risks affecting your portfolio and the financial markets.
- You maintain full flexibility since you make all investment decisions yourself.

### Key features

Proactive advice	Direct and constant access to a team of experienced investment advisors and fast reaction to changing market conditions
Tailor-made investment ideas	Highly customised investment recommendations and timely execution services
Investment process	Access to the investment advisory investment strategy and sophisticated investment process
Investment information	Regular publications focused on the highest conviction ideas and an offering selected by our in-house experts globally
Portfolio monitoring	Advanced and comprehensive portfolio monitoring reflecting inherent portfolio and market risks
Investment opportunities	Initial and semi-annual portfolio reviews including tailor-made switch recommendations
Investment strategies	Income, Balanced, Growth
Minimum amount	CHF 5.0 million or equivalent
Contact	Your dedicated investment advisor

### Controlled, proactive and timely

If you are part of our sophisticated clientele, which values a customised advisory service, direct access to financial markets information and an immediate implementation of its decisions by its investment advisor, the direct Investment Advisory Mandate is the right choice for you.

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