EFG Entrepreneurial thinking.
Private banking.

Advisory Solutions

Your trusted investment network

Welcome

Customised, specialist advice on the management of your assets.

We believe that a successful investment strategy consists of two key elements: professional advice and customised offerings.

At EFG, we strive to offer clients the best possible service and advice based on a deep understanding of their unique financial situation, goals and risk appetite. Our client-centric philosophy ensures that the advice we provide is tailored to each client's specific needs and is also highly relevant to their individual circumstances.

Our Client Relationship Officers and Investment Counsellors are at your side every step of the way, offering you expert advice, coupled with access to sophisticated portfolio monitoring tools and support. We are committed to providing insights and strategic advice to help you make informed decisions and to empower you to take control of your portfolio.

We believe that this collaborative approach fosters an open dialogue and partnership mindset, ensuring that you feel supported at all times when managing your investments.

With our open product architecture, you can gain holistic advice across all asset classes from investment professionals around the globe.

EFG's Advisory Solutions combine personalised, expert support and advice with a collaborative and transparent approach, enabling you to achieve your financial goals with confidence.

ANDRE PORTELLI
Head of Investment Solutions
EFG International

Our commitments *to you*

We are committed to building a successful long-term relationship with you based on trust.

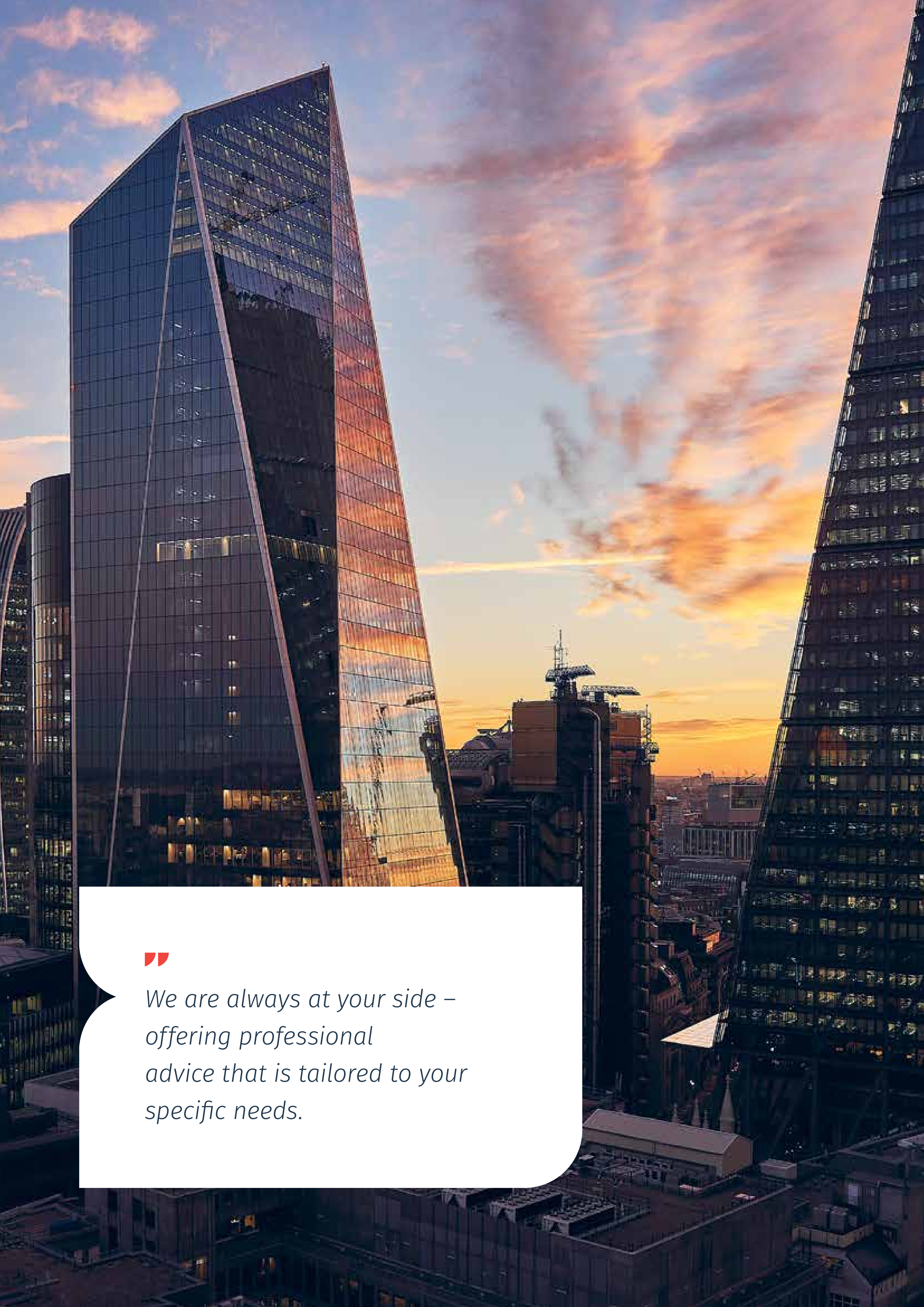
Our aims:

You stay in **full control of all your investment** decisions with services tailored to your needs

We offer you **impartial** and **holistic advice** across asset classes via an **open product architecture**

We provide you with access to our **global investment** professionals and **local knowhow**

Our investment solutions are always aligned with your needs and interests.



We are always at your side – offering professional advice that is tailored to your specific needs.

Benefits of *Advisory Solutions*[1]

We believe that professional advice and customised offerings are the key elements of every successful investment strategy.

Customised advice

All aspects of your **financial needs and objectives** are considered before we provide you with tailored investment advice

Subject matter expertise[1]

Your Client Relationship Officer (CRO) and Investment Counsellor (IC) leverage EFG's investment expertise to **offer you high-quality advice** across all asset classes

ESG[2] considerations

We **integrate ESG considerations** into the advisory process using our proprietary ESG rating system

Tailored communications

You receive and discuss **investment ideas and portfolio updates** when and how it suits you

Global investment capabilities

You have full access to EFG's **global investment capabilities** and investment universe at all times

Risk management

You also receive advice on **risk management**, as this is one of the key elements of successful portfolio strategies

[1] Service levels may vary, depending on the service level that is chosen. Please see page 15 and/or contact your Client Relationship Officer for further information.

[2] Environmental, social and governance – see page 25 for further information.

The value of investments can fall as well as rise, your capital is at risk.

Why choose *EFG Advisory Solutions*

Stay in full control of your investment decisions while leveraging EFG's global presence and investment expertise.

Clearly differentiated advisory service models designed to meet **your investment needs**

Investment advice, portfolio construction and solutions based on your individual preferences

Access to our team of **investment professionals**

Sophisticated portfolio monitoring and reporting tools to ensure you stay informed and know when to act

Global macro research expertise and repeatable investment processes, which are applied at a local level in alignment with our highest conviction ideas

The value of investments can fall as well as rise, your capital is at risk.

”

Customised, specialist advice
on the management of your assets.

Adding ***value*** for you at every stage

An advisory process that revolves around you.[1]

Step 1

Determine your investment risk profile

—

An in-depth analysis of your investment needs and objectives is conducted to establish the basis for your investment strategy.

Step 2

Define your long-term strategy

—

Based on your long-term objectives, your target portfolio structure is aligned with your portfolio risk and return objectives.

Step 3

Investment preferences

—

Your individual investment preferences are discussed to ensure alignment with your portfolio strategy.

Step 4

Portfolio implementation

—

Depending on the solution selected, your CRO, Investment Counsellor or Asset Class Specialist will work with you to implement your investment strategy

Step 5

Portfolio monitoring

—

Your portfolio will be constantly monitored with regular updates which support you in identifying risks and opportunities.

Step 6

Portfolio review

—

Your CRO or IC[2] will regularly review your portfolio structure, performance, risk exposure and overall strategy and discuss with you as required.

[1] This process does not apply to our transaction-based advice model Advisory LIGHT.
[2] Dependent on service chosen – see page 13 for further information.
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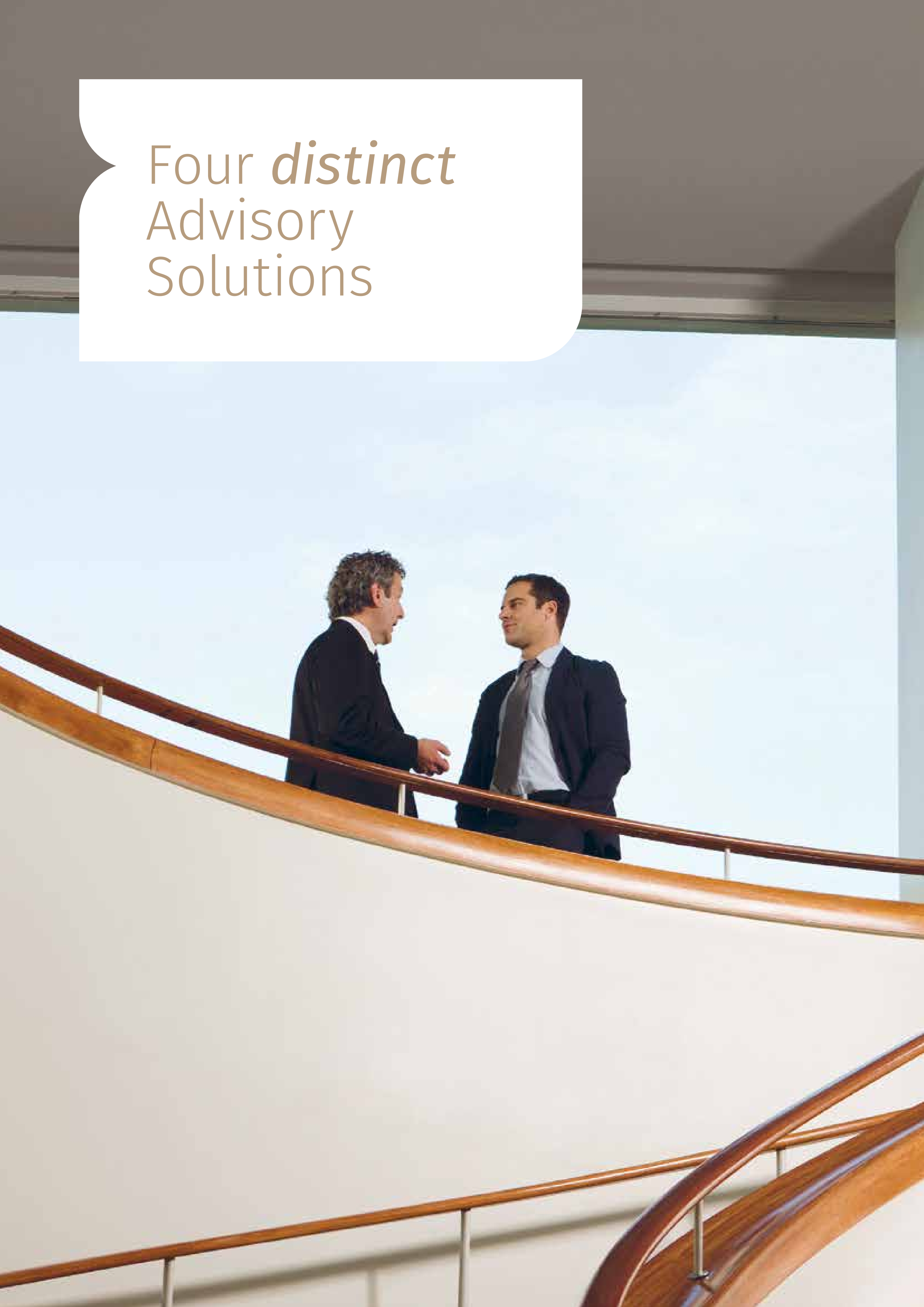
Four *distinct* Advisory Solutions



Catering to your individual needs, no matter how sophisticated your investment strategy or the level of support you require.

Advisory PRO+

All the benefits of PRO with enhanced levels of service and customisation

- An additional service module that comprises all of the services offered in Advisory PRO
- Includes access to an Asset Class Specialist, fully tailored portfolio strategies and fully customised reporting

Advisory PRO

Designed to solve the most sophisticated investment needs

- Caters to the most sophisticated client needs, with a dedicated Investment Counsellor offering expertise, including advice on derivatives and alternatives
- Opportunity to explore our high-conviction investment themes, sectors and investment styles
- Full access to investment analysis, ideas and strategies with continuous portfolio monitoring

Advisory ACTIVE [1]

Providing you with holistic portfolio advice across all asset classes

- Examine investment ideas whenever you wish with your CRO
- Utilise our investment models which are optimised to deliver competitive portfolio risk and return
- Full access to investment analysis, ideas and strategies with regular portfolio monitoring

Advisory LIGHT [2]

Providing advice on individual investment ideas

- Advice on individual security transactions across all asset classes
- Ability to examine investment ideas with your CRO
- Full access to investment analysis and ideas plus our proprietary investment publications

[1] Not available in the UK or Jersey. [2] Only available to non-EEA clients.

The value of investments can fall as well as rise, your capital is at risk.

Our *Advisory Solutions* at a glance

Choose the right Advisory Solution to meet your investment needs.

		Advisory PRO+	Advisory PRO	Advisory ACTIVE[1]	Advisory LIGHT[2]
Available advisors and specialists:	Client Relationship Officer	●	●	●	●
	Investment Counsellor	●	●		
	Asset Class Specialist	●			
Scope and sophistication of investment advice:	Type of advice	Tailored portfolio and transaction-based	Tailored portfolio and transaction-based	Standardised portfolio and transaction-based	Transaction-based
	Focus of advice	Holistic on multiple portfolios	Holistic on multiple portfolios	Single portfolio	Single securities
	Consideration of Alternatives, Derivatives, Hedging instruments etc.	●	●		
Portfolio management requirements:	Portfolio monitoring and review	Tailored monitoring and reviews	Tailored monitoring and reviews	Standard monitoring and reviews	
	Frequency of portfolio review	Frequent	Frequent	Ad hoc	
	Performance reviews[3]	●	●	●	●
Access to investment content:	Proprietary investment publications	●	●	●	●
Investment amount:	Minimum investment[4]	From 5 million	From 1 million	From 0.25 million	From 0.25 million

[1]Not available in the UK or Jersey. [2]Only available for non-EEA clients. [3]Biannually. [4]Minimum investment amounts vary by region.

The value of investments can fall as well as rise, your capital is at risk.

Advisory
PRO+

Advisory **PRO+** | Advisory PRO | Advisory ACTIVE | Advisory LIGHT

All the benefits of *PRO* with enhanced levels of service and customisation.

Your profile

You want access to enhanced advisory services.

Benefits of the Advisory *PRO+ module*:

- Advisory ***PRO+*** **is our most sophisticated service module**
- In addition to the services included in Advisory PRO, you benefit from:
  - *Access to an* ***Asset Class Specialist*** *for in-depth portfolio analysis, risk management and special investment opportunities*
  - ***Fully tailored portfolio strategies*** *across all asset classes, including less liquid segments (e.g. private equity, private debt, real estate, hedge funds)*
  - ***Fully customised reporting***

Advisory
PRO

Advisory
PRO+

Advisory
PRO

Advisory
ACTIVE

Advisory
LIGHT

Designed to meet the most sophisticated investment needs.

Your profile

You are looking for comprehensive and sophisticated portfolio strategies, optimising long-term risk and return.

Benefits of the Advisory *PRO* solution:

- You have **full access to a dedicated Investment Counsellor** who will support you in exploiting the full range of investment instruments and strategies for your portfolio
- Your personal Client Relationship Officer and Investment Counsellor ensure the **highest standard of portfolio monitoring** to promptly identify investment risks and opportunities
- Our investment professionals assist you in defining your **investment strategy and asset allocation** and provide customised advice to enhance the results of your individual strategy

Advisory
ACTIVE

Advisory **PRO+** | Advisory **PRO** | Advisory **ACTIVE** | Advisory **LIGHT**

Providing you with holistic portfolio advice across all asset classes[1].

Your profile

You are seeking holistic advice and the opportunity to actively discuss transactions and portfolio strategy.

Benefits of the Advisory *ACTIVE* solution:

- **Interact** with your Client Relationship Officer whenever needed
- Gain full access to **investment analysis and investment ideas**
- Full access to EFG investment models which aim to deliver **competitive risk-adjusted returns**
- **Regular portfolio monitoring** keeps you up to date about important portfolio parameters
- Adjust your portfolio according to your specific investment requirements and combine it with our **award-winning investment capabilities**

[1] Not available in the UK or Jersey.

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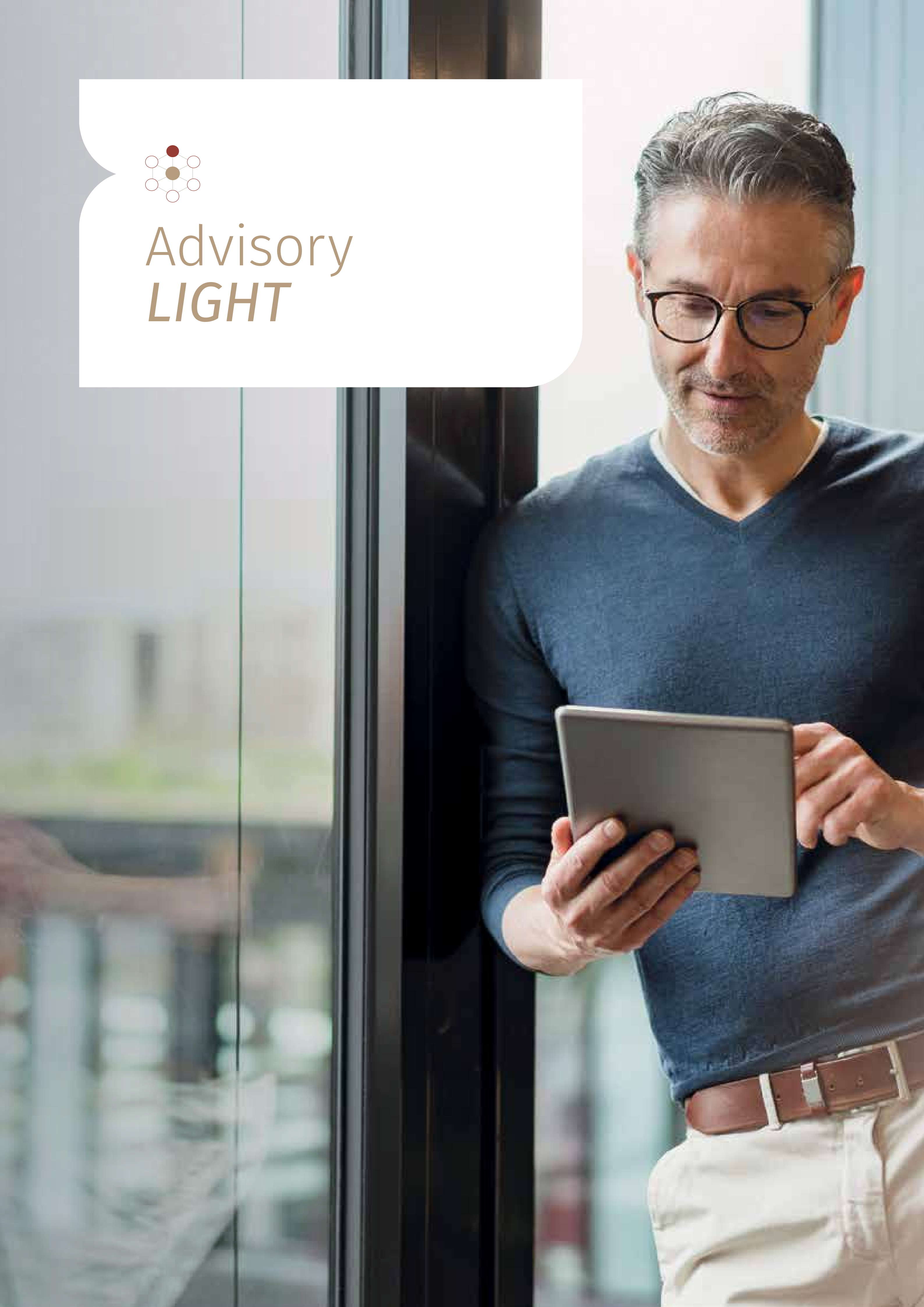
Advisory *LIGHT*



Advisory *PRO+* | Advisory *PRO* | Advisory *ACTIVE* | Advisory *LIGHT*

Offering you advice on individual investment ideas[1].

Your profile

You are seeking expert advice on individual security transactions

Benefits of the Advisory *LIGHT* solution:

- You benefit from the opportunity to discuss investment ideas with your **Client Relationship Officer**
- You can leverage **EFG's Investment expertise** by gaining full access to our investment universe and investment analysis
- You receive **switch recommendations and investment ideas**

[1] Only available to non-EEA clients.

The value of investments can fall as well as rise, your capital is at risk.

Read EFG's latest
Sustainability Report

Transition[1] Offering

- A global transformation process is needed to transition to a more circular and efficient economy, one which addresses social inequality and ensures the prosperity of future generations.
- This global challenge will create new **investment opportunities** and risks, which we want to consider in our investment process.
- The **EFG Transition Offering** is our holistic framework that addresses ESG[2] related opportunities and risks. It aims to pair financial performance with environmental and social considerations.

Investment opportunities

The transition to a more sustainable economy is underway as changing consumer behaviour and new business models influence investor demand and create new investment opportunities.

Risk mitigation

Sustainability risks are ESG events or conditions that could have a material negative impact on the value of an investment. Integrating ESG considerations into our investment process provides an additional layer of risk assessment.

The Transition Offering is not available in Asia.

[1] As the world transitions to a more sustainable future, there is increasing pressure on companies and industries to reduce their carbon emissions, adopt more socially and environmentally friendly practices and develop new products and approaches to conduct business. Those companies or industries that fall behind may face significant financial risks, such as stranded assets, lower profitability or regulatory penalties while others will thrive and gain a competitive advantage.
[2] ESG – Environmental, Social and Governance.

Our locations

SWITZERLAND

Zurich (headquarters)
Chiasso
Geneva
Gstaad
Lausanne
Locarno
Lugano
St. Moritz

EUROPE

Athens
Birmingham
Jersey
Limassol
Lisbon
London
Luxembourg
Monaco
Nicosia
Ombersley
Porto
Shrewsbury
Vaduz

ASIA PACIFIC

Adelaide
Brisbane
Canberra
Hong Kong
Melbourne
Perth
Shanghai
Singapore
Sydney

AMERICAS

Bogotá
Grand Cayman
Lima
Miami
Nassau
Panama City
Portland
Punta del Este
Rio de Janeiro
São Paulo

MIDDLE EAST

Bahrain
Dubai
Tel Aviv

Local experts — *around the globe*

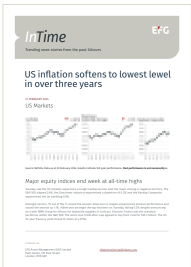
EFG was founded in Zurich, the Swiss financial centre at the heart of Europe, and this is where our bank's headquarters are located. Switzerland's solid and entrepreneurial economy continues to inspire our approach to business as we expand around the globe.

With a presence in over 40 locations spanning every time zone from Asia Pacific to Europe and from the Middle East to the Americas, we are ideally positioned to support you, no matter where you are.

When managing global wealth, our teams combine their international expertise and local knowhow with access to our local Client Relationship Officers and Investments Counsellors.

Investment *publications*

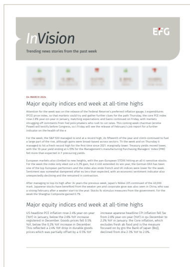
Stay updated on investment opportunities, macroeconomic trends, market movements and the global economic outlook with our suite of investment content.



INTIME
Daily Market Note

Summarising the most important market events from the past 24 hours

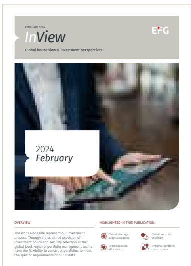
Frequency: Tuesday to Friday



INVISION
Weekly Macro Note

Outlining the main macroeconomic events from the past week

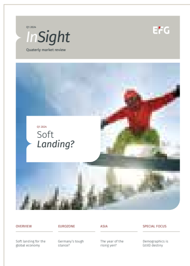
Every Monday



INVIEW
Global House View

Offering asset allocation guidelines, macro overviews and investment ideas

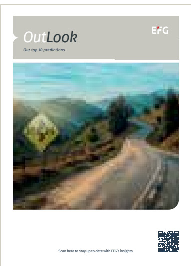
Frequency: Monthly



INSIGHT
Market Review

High-level overview of asset market performance, key regions and includes a special focus

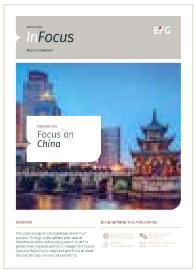
Frequency: Quarterly



OUTLOOK

Our top 10 predictions for the year ahead

Frequency: Annual



INFOCUS
Macro Comment

An analysis of prevailing market events

Frequency: Ad hoc

Podcast: Beyond the Benchmark

In each episode of Beyond the Benchmark, Moz Afzal, EFG's Chief Investment Officer, shares his insights on the developments shaping the markets and the global economy, speaking with special guests who have a particular point of view.

Frequency: Ad hoc

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