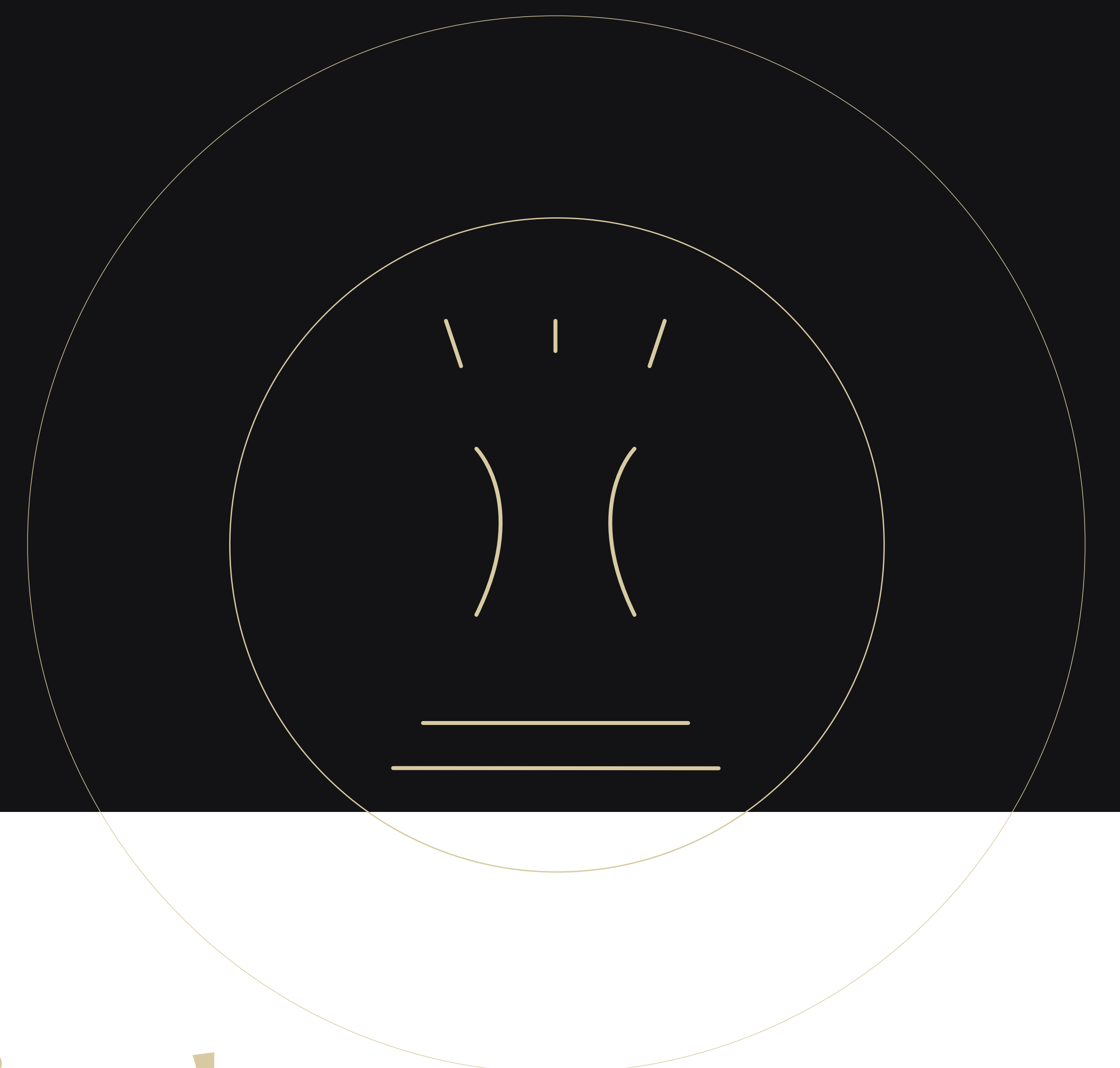
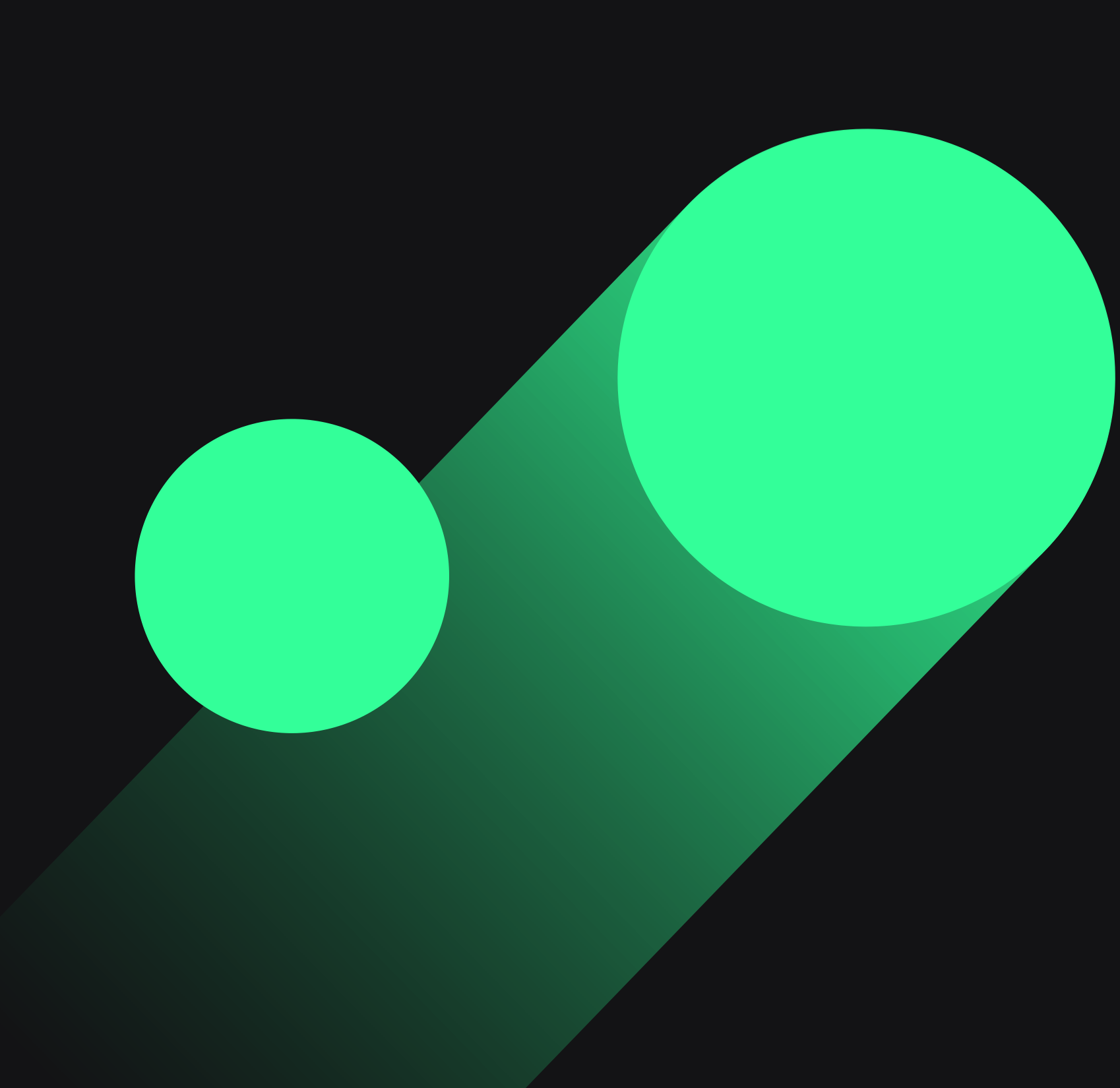




everon

Wealth management

FACT SHEET



What you can find in this document

- What wealth management is.
- How we can help you with your wealth management account.
- Features and fees.
- How you can get started.



What is wealth management?

The traditional service of wealth management is that you define and agree on an investment framework with your wealth manager. You specify your personal preferences and subsequently, your risk profile is determined by:

- Your financial situation
- Your investment goals
- Your personal risk perception

After this, the construction of the portfolio and the individual investment decisions are delegated to the wealth manager. The wealth manager is monitoring your investment portfolio and adjusts it if necessary.

The important advantage of a wealth management mandate is that you don't have to take care of the day-to-day management of the portfolio and don't need to analyze investment opportunities that fit your strategy.

As this used to be a manual and work-intensive service, traditional institutions imposed high minimum capital requirements, which made it available only to very wealthy clients.

We are changing this approach by providing you access to a premium service through the use of technology.

How we can help you with investing your money

- We help you find the right degree of risk for your investment portfolio.
- We answer all your questions about investing, wealth creation and financial markets.
- We are always there to answer all your questions in person.
- We define and implement your personalized investment strategy with you.
- We are completely independent in our advice and selection of investment instruments.
- We give you a detailed overview of all your funds and in which companies you are invested.
- We offer you sophisticated investment strategies used by institutional investors.

Features and Fees

Discretionary mandate starting already from 30'000 CHF.

Direct investments as much as possible.

Smaller portfolios are invested directly as the value increases.

Monthly rebalancing of the portfolio.

Personal advice on demand.

Continuous risk monitoring of your portfolio.

Construction of investment portfolios according to personal preferences.

1.05% all-in-fee, including transaction fees. Foreign currency exchanges are done at the interbank rate with no commission.

(0.7% wealth management fee + 0.35% custody fee)

How you can get started

1



Scan the QR code to download the Everon app.

2



Sign-up for free.

3



Let us guide you in your investment decisions.



Who we are

We believe that access to independent wealth management and the best investment opportunities should not be a privilege for the few.

Our mission is to help everyone make the right decisions for their financial lives. That's why we created Everon, combining innovative technology with independent guidance and the most attractive investment options.

Scan the QR code to book a non-binding consultation



[https://calendly.com/everon-support/
beratungsgespraech-30min](https://calendly.com/everon-support/beratungsgespraech-30min)



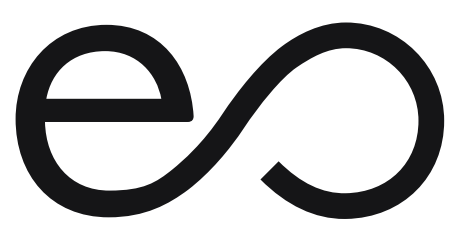
Florian Rümmelein
+41 44 545 08 11
florian.ruemmelein@everon.swiss
www.everon.swiss



Robin Bender
+41 44 545 08 19
robin.bender@everon.swiss
www.everon.swiss

ADDRESS

Gartenstrasse 17
CH-8002 Zurich
Switzerland



The statements and data in this publication have been compiled by Everon to the best of its knowledge **for informational and marketing purposes only**. This publication constitutes **neither a solicitation nor an offer or recommendation to buy or sell any investment** instruments or to engage in any other transactions. It also does not constitute advice on legal, tax or other matters. The information contained in this publication should not be considered as a personal recommendation and does not consider the investment objectives or strategies or the financial situation or needs of any particular person. It is based on numerous assumptions. Different assumptions may lead to materially different results. All information and opinions contained in this publication have been obtained from sources believed to be reliable and credible. Everon and its employees disclaim any liability for incorrect or incomplete information as well as losses or lost profits that may arise from the use of information and the consideration of opinions.

A performance or positive return on an investment is no guarantee for performances and a positive return in the future. Likewise, exchange rate fluctuations may have a negative impact on the performance, value or return of financial instruments. All information and opinions as well as stated forecasts, assessments and market prices are current only at the time of preparation of this publication and may change at any time without notice. Duplication or reproduction of this publication, in whole or in part, is not permitted without the prior written consent of Everon is not permitted. Unless otherwise agreed in writing, any distribution and transmission of this publication material to third parties is prohibited. Everon accepts no liability for claims or actions by third parties arising from the use or distribution of this publication. The distribution of this publication may only take place within the framework of the legislation applicable to it. **It is not intended for individuals abroad who are not permitted access to such publications due to the legal system of their country of domicile.**

Zurich, 9th January 2023