



## Investment Accounts

### MOVE*classic*

The classic  
investment account

- > 10.000 products\*
- Funds and ETFs from more than 400 investment companies
- Ideal for the client with an individual choice of securities

*\* depending on the country of origin/distribution authorisation*

### MOVE*flex*

The flexible  
investment account

- Same product variety as MOVEclassic
- Flexibility in fee structure
- Also suitable for fee-based advisors

### MOVE*easy*

The investment  
account with different  
investment strategies

- Portfolio with pre-selected funds
- For different risk/opportunity profiles
- With quarterly rebalancing

### MOVE*active*

The actively managed  
investment account

- Actively managed account with an asset management mandate
- For different risk/opportunity profiles
- With quarterly rebalancing and detailed reporting

## MOVE*classic*

### Classical brokerage account

- › Annual account fee of 48 EUR
- › Standard transaction fees for investment funds and other securities
- › Reduced transaction fees for Top 100 ETFs
- › Standard custody fees
- › Standard trailer fee terms
- › Frontload discountable up to 100%
- › Standard reporting

## MOVE*flex*

### Brokerage account with flexible fee structure

- › Platform fee based on account assets
- › Standard transaction fees for investment funds and other securities
- › Reduced transaction fees for Top 100 ETFs
- › Standard custody fees
- › Standard trailer fee terms
- › Frontload discountable up to 100%
- › Standard reporting
- › Financial advisor may choose to pass on trailer fees to investor
- › Financial advisor may add an ongoing service fee and/or a charge on incoming payments

## MOVE*easy*

### Portfolio allocation with quarterly rebalancings for different risk/opportunity profiles, no asset management mandate

- › Platform fee calculated based on account assets
- › No account fee, no transaction fee, no custody fee, no portfolio management fee
- › Financial advisor may choose to pass on trailer fees to investor
- › Financial advisor may add an ongoing service fee and/or a charge on incoming payments
- › Momentum offers fixed investment models in an „execution only“ framework (no active management) for different risk/opportunity profiles, e.g. MOVEeasy inspired by Vanguard funds
- › Quarterly rebalancing
- › Standard reporting

## MOVE*active*

### Professional asset management with asset management mandate between client and portfolio manager

- › Platform fee calculated based on account assets
- › No account fee, no transaction fee, no custody fee
- › Portfolio management fee between client and portfolio manager
- › Financial advisor may choose to pass on trailer fees to investor
- › Financial advisor may add an ongoing service fee and/or a charge on incoming payments
- › Quarterly rebalancing and reallocation
- › Detailed portfolio reporting for financial advisor and clients
- › Advisor support through regular webinars

