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Client Experience

Digital account opening process

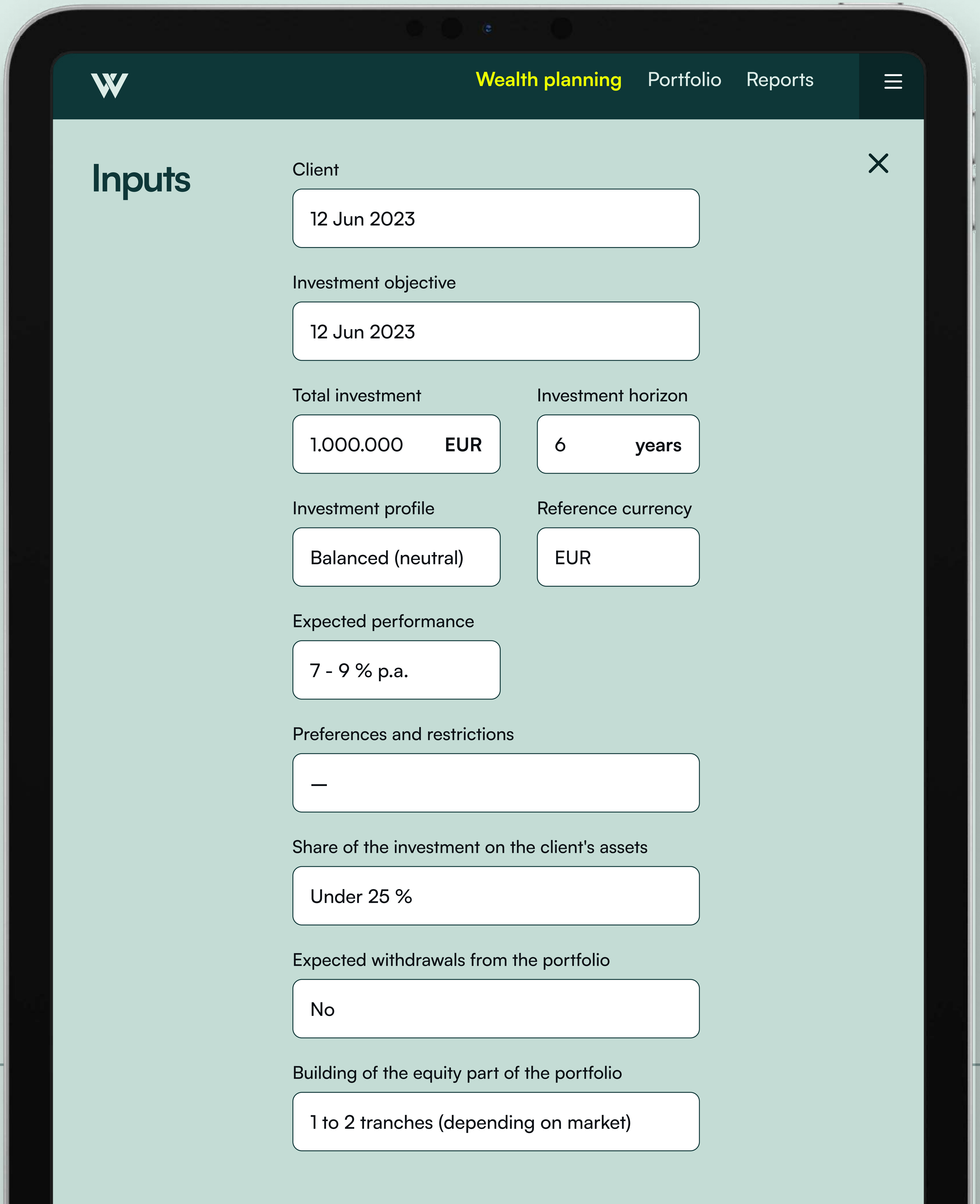
1 **Identification**
Personal data collection

2 **Digital process**
Stress and paper free

Wealth Planning

Client Needs Assessment

- Investment objective
- Investment profile
- Expected performance
- Preferences & restrictions



Wealth planning Portfolio Reports

Proposed asset allocation

ASSET CLASS	Initial	Target
Cash & equivalents	**100%**	**0%**
Bonds	**0%**	**25%**
Investment grade	0%	5%
High yield	0%	15%
Emerging markets	0%	5%
Equity	**0%**	**30%**
Core	0%	22%
Satellite	0%	8%
Real estate	**0%**	**30%**
Office	0%	10%
Retail	0%	10%
Other	0%	10%
Alternative investments	**0%**	**15%**
Absolute return	0%	4%
Venture a private equity	0%	8%
Digital currencies	0%	2%
Other (commodities, ...)	0%	1%

Wealth Planning

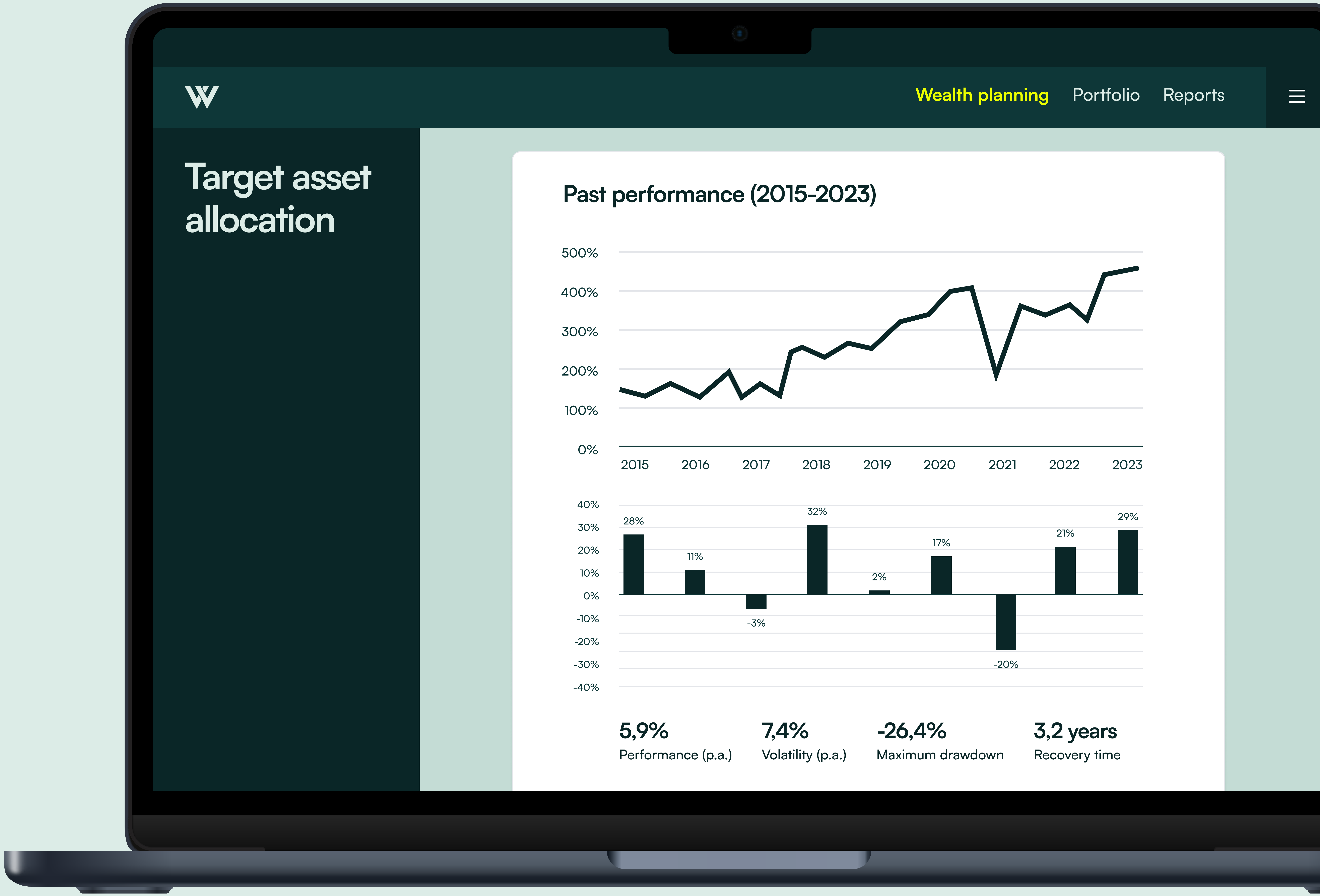
Tailor-made Portfolio Proposal

- Strategic asset allocation
- Tactical portfolio allocation follow-up
- Bond — Equity weight proposal
- Real estate — Alternative investments weighting

Wealth Planning

Portfolio Back-test

- Benchmark based back-test
- Past performance visualization
- Key portfolio figures: performance, volatility, max. drawdown



Wealth planning Portfolio Reports

Crisis
Stress Test

	Dot-com bubble	Global financial crisis	European debt crisis	Chinese crisis	COVID-19 pandemic
Start	31 Aug 2000	31 Oct 2007	30 Apr 2010	29 May 2015	31 Dec 2019
End	28 Sep 2000	27 Feb 2009	31 Oct 2010	29 Feb 2016	31 Mar 2020
Duration	13 months	16 months	4 months	9 months	3 months
Drawdown	-7,4%	-26,4%	-4,6%	-7,0%	-12,3%
Year after	-4,3%	-22,6%	9,8%	-2,7%	11,4%
3 years after	5,8%	-0,4%	17,0%	13,7%	8,6%
5 years after	29,6%	5,4%	33,4%	15,6%	–
10 years after	59,1%	43,6%	50,7%	48,2%	–

Wealth Planning

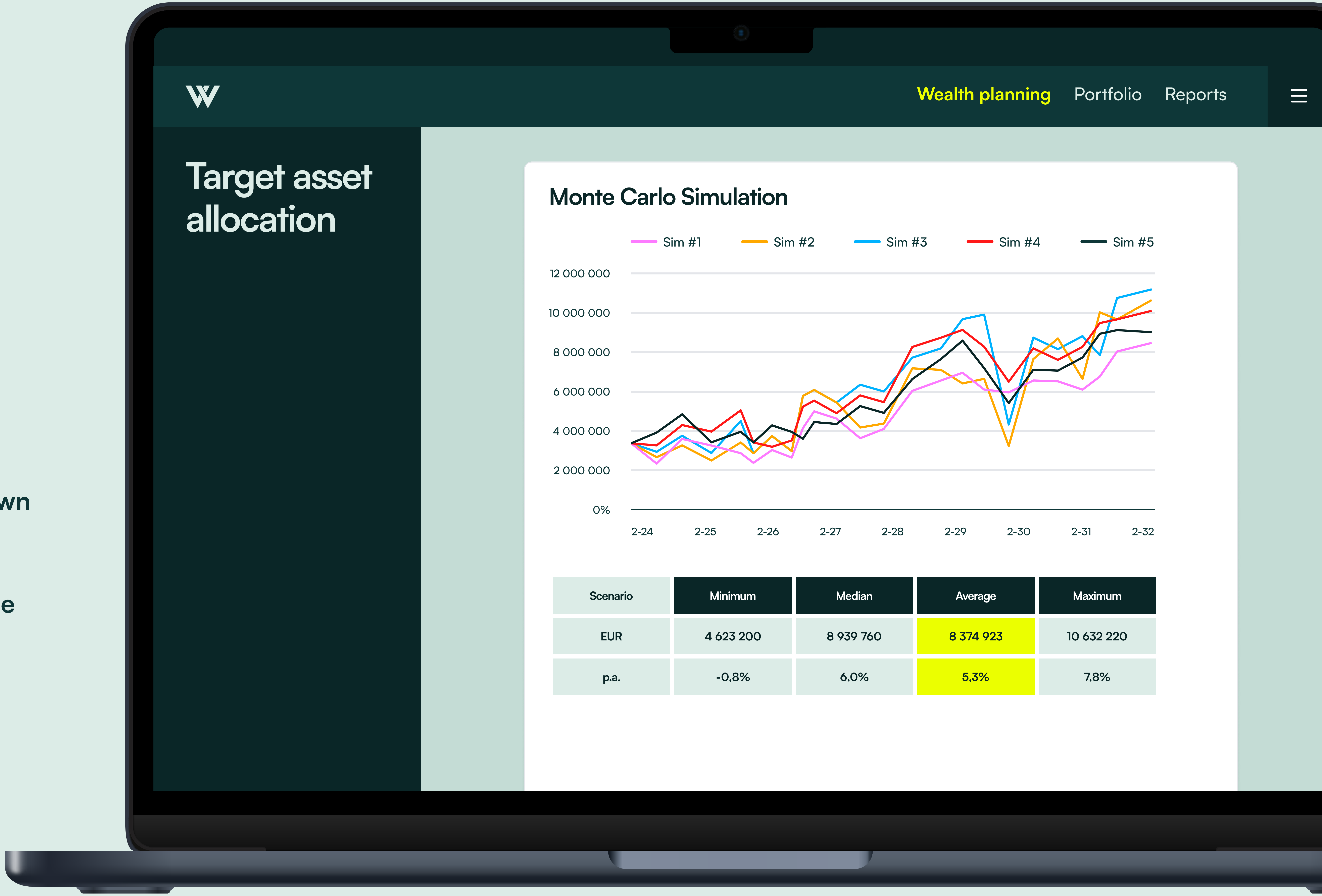
Crisis Stress Test

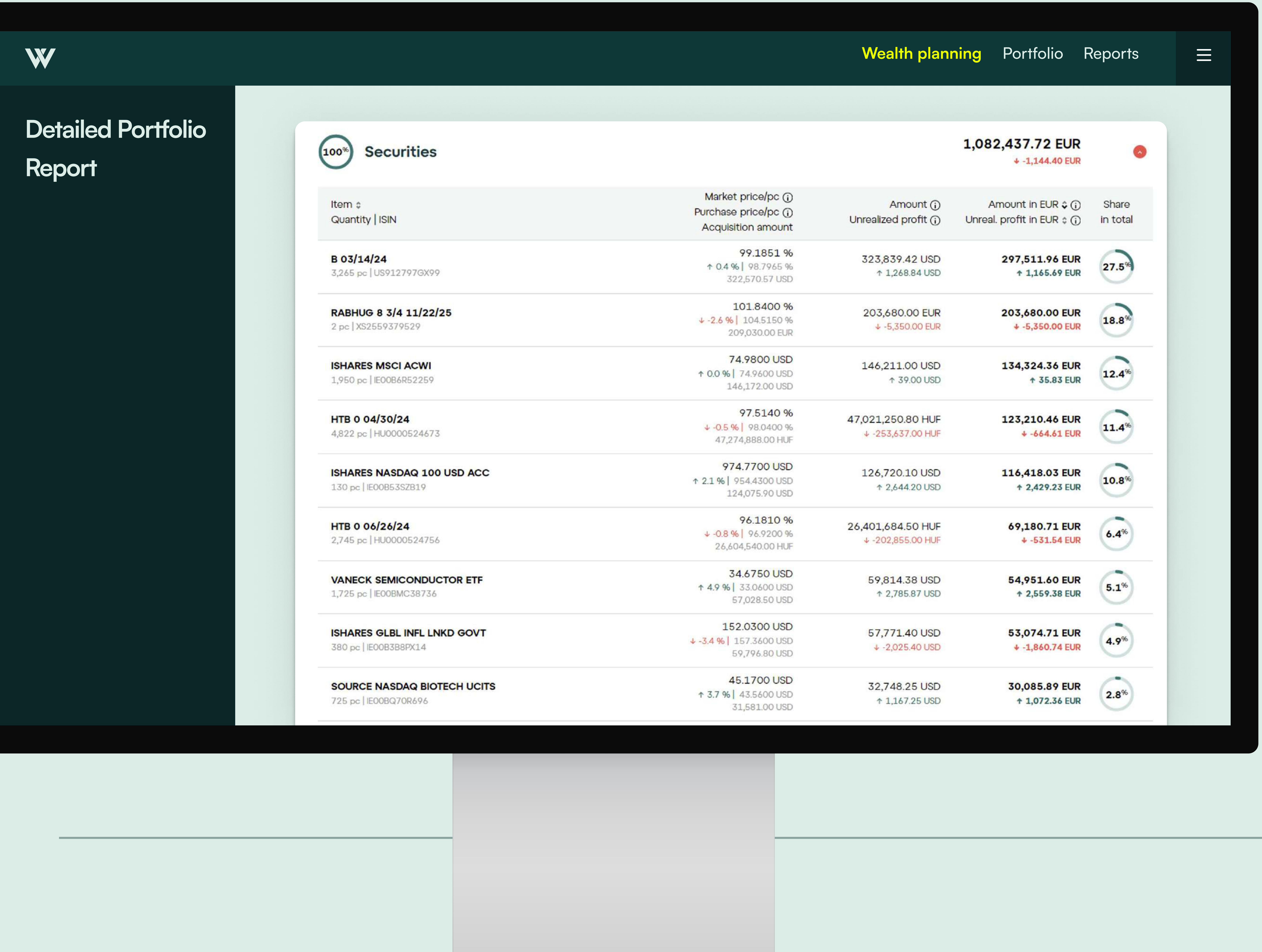
- Portfolio simulation under stressed market conditions
- Maximum drawdown in turbulent markets
- Duration of crisis periods
- Portfolio recovery time

Wealth Planning

Forward Looking Simulation

- Monte Carlo Simulation to better simulate the unknown
- Better understanding of all possible outcomes
- Visualization of potential future portfolio performance





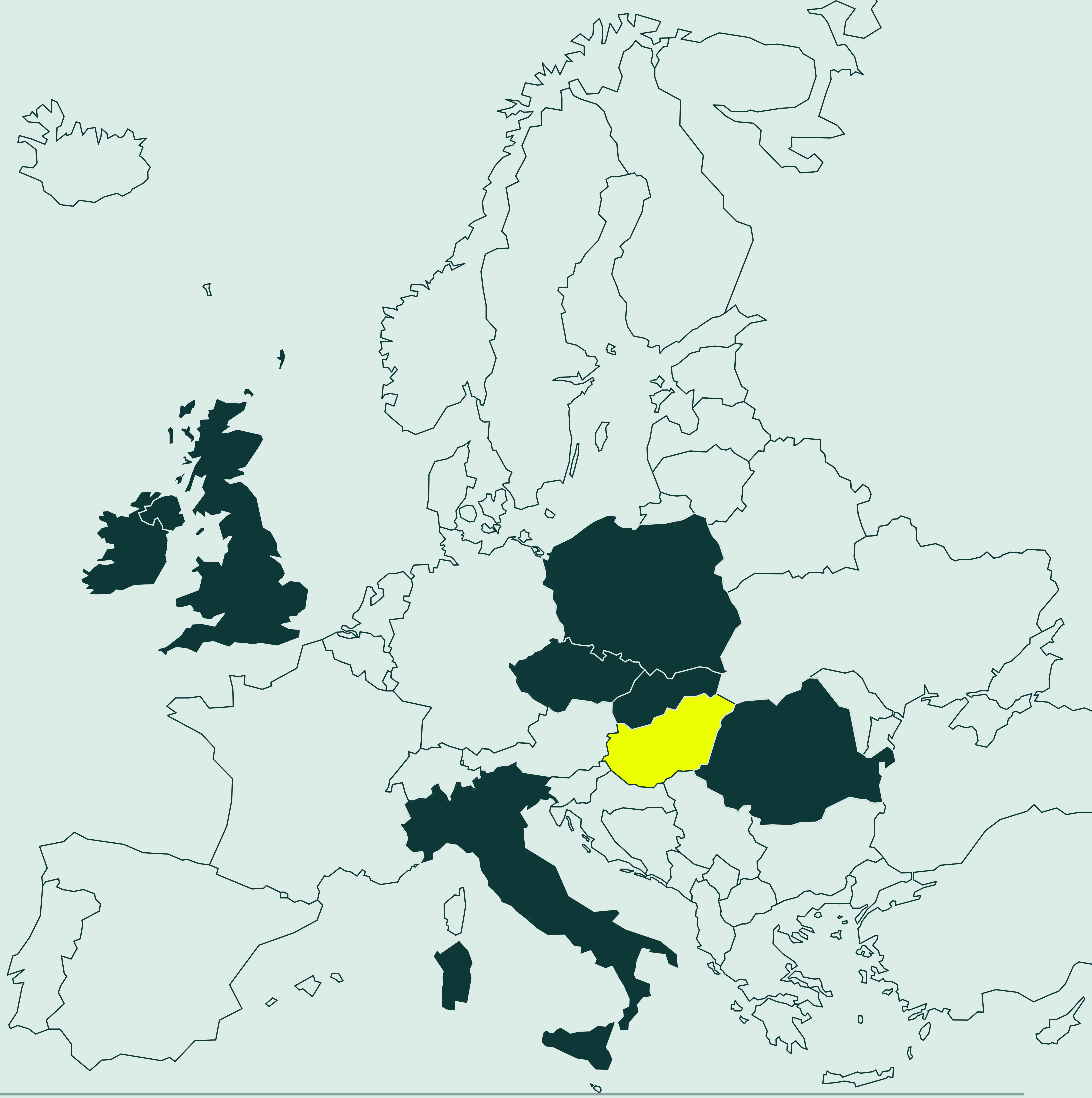
Online Access

Detailed Portfolio Report

- Portfolio summary in EUR
- Detailed asset view and valuation
- Transaction history
- Investment opportunities

Offices

WOOD & Co. Offices	Capital W Office
Prague	Budapest
Bratislava	
Milan	
Warsaw	
London	
Dublin	
Bucharest	



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Let’s get in touch.

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