

# Investor Relations

## CF Banque Investor Relationship

CF Banque Investor relationship is established when a customer engages with us to utilize its financial services, creating a legal relationship expressed through a contract. This relationship is built on trust and mutual obligations between the CF Banque and the Investor, with defined rights and duties for both parties. Contract can be a complex process, influenced by the nature of the relationship, the duties of both parties, and the legal framework governing such terminations.



## Investor relationship management

Bank Investor relationships are managed through Investor relationship management strategies. They are established through effective communication, personalized services, and trust-building.

The relationship in investment banking is built on a relational contract based on mutual trust. It is shaped by digitalization and multichannel strategies, impacting in-person interactions. It's fostered through brand identity marketing towards staff, aiming to enhance and sustain the brand's image strategically. Also, it is shaped through social media, enhancing customer acquisition, branding, and reputation management.

The relationship involves account opening and settlement activities. It is created through a bank account agreement and can be terminated by either party according to legal provisions.

# Invest the way that works for you

Whether you prefer to invest on your own, with an advisor or a combination of both, CF Banque Personal Wealth Management can provide strategies to help you meet your goals.

## Choose how you invest

When you invest with CF Banque you can get as much, or as little, help as you need. Investments count towards your overall CF Banque account balances and can unlock additional banking benefits.

## OVERVIEW

Take control of your investments with CF Banque Self Invest - a commission-free trading account, so you can be hands-on with your investments and manage your portfolio with more confidence.



## KEY BENEFITS

- [1] Make trades with no commissions and no minimum balance.
- [2] Choose from wide range of stocks, ETFs and mutual funds.
- [3] Explore guided content on financial wellness, investing and saving with the Investor Learning Center.
- [4] Gain access to financial Insights and market news.



## Self Invest

Take control of your investments with CF Banque Self Invest, a self-directed, commission-free<sup>1</sup> trading account that lets you manage your portfolio with more convenience.



### No Account Minimums

Simply fund your self-directed investment account, and you're ready to trade.

### More Banking Benefits

Investments may count towards your overall CF Banque account balances.

### Invest Anywhere

Trade at home on your desktop or on the go with our mobile app.

### Always-on Service

Enjoy support from a dedicated CF Banque team.



## Features for Every Self-Directed Investor

### Invest Your Way

Trade thousands of different stocks, mutual funds and ETFs with no commissions and no account minimum.

### Educational Resources

Learn about personal finance with educational articles in the Investor Learning Center.

### Latest Market News

Keep up to date with the latest financial news and commentary.

### Custom Watchlists

Create your own watchlists to follow the movement of the securities you're interested in.

# How Guided Investing Works

## 1. Answer a few questions

We'd like to know more about you. Tell us about your risk tolerance, time horizon and investment goals.

## 2. Choose an investment strategy

You'll be able to review your matched portfolio before opening and funding your CF Banque Wealth Builder account.

## 3. Sit back and relax

We'll make sure your portfolio is regularly monitored and rebalanced to adjust to life's changes.

## 4. Included with CF Banque Wealth Builder Plus

Access professional investment advice and tap into the experience of our Financial Advisors, enhancing the ease of automated investing with personalized support.

