

Annex 1: FIDLEG Art. 8f: Information about Konrad Zehnder Wealth Partners AG

1. Approval status

- 1 Konrad Zehnder Wealth Partners AG (the "**Company**") is a financial services provider within the meaning of the Financial Services Act (FinSA) with its registered office at Gartenstrasse 33, 8002 Zurich, Switzerland.
- 2 The Company is mainly active in the areas of professional asset management and investment advice for individual clients.
- 3 The Company is supervised by FINcontrol Suisse AG.
- 4 The licensing authority is the Swiss Financial Market Supervisory Authority FINMA.

2. Ombudsman's Office

In accordance with Art. 74 et seq. FinSA, the Company is affiliated with the financial ombudsman "Ombud Finanzen Schweiz OFS". In the event of disputes with the Company, retail clients within the meaning of Art. 4 para. 2 FinSA and professional clients within the meaning of Art. 5 para. 1 FinSA may initiate mediation proceedings through such ombudsman's office.

3. Management

The Company has two qualified managing directors within the meaning of Art. 20 para. 1 FinIA.

4. Business activity of the Company

The Company's business activities include, in particular, the following areas:

- The Company provides discretionary asset management on a professional basis within the meaning of Art. 3 lit. c no. 3 FinSA. In order to exercise the mandates, the Company obtains powers of attorney from the clients vis-à-vis the respective custodian banks. If a client so wishes, the Company will only carry out transactions after obtaining the client's approval.
- In addition, the Company provides transaction-related investment advice on a professional basis within the meaning of Art. 3 lit. c no. 4 FinSA. The decisions and the implementation of the investment recommendations are the responsibility of the clients. In these cases, the Company is not authorized to issue instructions to the custodian banks regarding the client's assets.

- The Company provides the following additional services: Family office services (family consulting, coordination of tax advice, foundation board activities, execution of payment orders, execution of wills and the like).
- The Company provides its financial services on the basis of written contracts concluded with clients, which contain all information on the characteristics, functions, rights and obligations of the parties as well as on the risks of the financial service provided.

5. Risks related to financial services

The risks associated with the financial services provided are explained to clients in each case before the contract is concluded. Clients are requested to carefully read the information provided, in particular the brochure "Risks Involved in Trading Financial Instruments" published by the Swiss Bankers Association (<https://www.swissbanking.ch/de/downloads>) and to contact the Company if they have any questions.

6. Cost information

Costs and fees are incurred in connection with the services provided by the Company. These are disclosed to the clients prior to the conclusion of the contract and regulated in detail in the contracts.

7. Third-party compensation

The Company does not receive any remuneration from third parties in connection with the provision of financial services. Should the Company exceptionally receive such remuneration, it will pass this on to the client insofar as this is possible with reasonable effort.

8. Participation in and economic links with third parties

There are no economic ties between the Company and third parties that could lead to a conflict of interest vis-à-vis clients in connection with the provision of financial services.

9. Market supply considered

The Company only considers third party financial instruments when providing financial services.

10. Dealing with conflicts of interest

The Company takes the necessary precautions to avoid conflicts of interest between itself or its employees and its clients and to protect clients from disadvantages. If a conflict of interest cannot be avoided, it is disclosed to the clients.

11. Data protection

The Company processes the personal data of the Clients in accordance with the applicable data protection laws and ordinances (in particular the Swiss Federal Data Protection Act DSG).

Further information on the processing of personal data by the Company can be found in the Company's privacy policy statement (www.konradzehnder.com).

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