



Corby SA

Bahnhofstrasse 28a, 8001 Zürich, Switzerland · UID CHE-105.594.174 · HR CH-020.3.023.426-4 · LEI 8945007DR27VYYGIA768

Active Swiss company · LEI status: issued

FinSA client brochure

This brochure provides pre-contract information before personalised advice or asset management. It explains who we are, how clients are classified, how fees work and how complaints are handled.

1. The firm

Corby SA, Bahnhofstrasse 28a, 8001 Zürich, Switzerland. Swiss UID CHE-105.594.174. Commercial-register number CH-020.3.023.426-4. LEI 8945007DR27VYYGIA768. The registered business includes management of the assets of others and advice and support in investment decisions.

2. Identity and verification

Corby SA is active and its LEI status is issued. No FINMA authorisation or supervisory-organisation affiliation has been supplied or verified.

Verify the company independently: Bloomberg LEI

<https://lei.bloomberg.com/leis/view/8945007DR27VYYGIA768>; Yellowpages

<https://yellowpages.swiss/location.cfm?art=HRB&company=Corby-SA&key=1426547>; Zefix

<https://www.zefix.admin.ch/en/search/entity/list/firm/529110>.

3. Services

We offer independent financial advice (retirement, investments, taxes, real estate and estate planning) and discretionary portfolio management for private individuals and families. We do not offer execution-only dealing as a standalone service and we do not issue or manage collective investment schemes.

4. Client segmentation

We treat you as a private client unless you request, and we agree in writing, professional-client status and you meet the FinSA tests. Private clients receive the full set of conduct and information duties. A change of segment affects the level of protection and must be documented.

5. Information, suitability and documentation



Before personalised advice we collect information on your knowledge, experience, financial situation and investment objectives. We assess appropriateness or suitability, explain material risks, and keep a record of the relationship. You receive a written analysis after the first meeting if you ask us to proceed.

6. Costs

Our costs are the fees in the schedule of fees and charges (management, advisory and, if elected, performance). Bank custody and transaction costs and product TER are additional and are shown separately. We will give you a personalised cost illustration before you sign a mandate.

7. Conflicts of interest

We are paid only by our clients. Advisers have no product sales targets. Unavoidable third-party payments are credited to you. Further detail and examples are in the conflicts of interest policy.

8. Complaints and mediation

Raise a complaint with Corby SA first. No ombudsman affiliation has been supplied or verified; the signed mandate must identify any applicable mediation route.

Registered address: Bahnhofstrasse 28a, 8001 Zürich, Switzerland.

9. Documents that form part of this information

Schedule of fees and charges; general terms and conditions; risk disclosure; conflicts of interest policy. All are available at </legal/documents-and-information>.

Corby SA, Bahnhofstrasse 28a, 8001 Zürich, Switzerland. Document date 15 September 2026. This document does not constitute personalised advice. Swiss law; exclusive place of jurisdiction Switzerland.