

Years of experience –
Swiss Life Asset Managers




How we work

- We manage your money as if it were our own
- Our investment philosophy aims at long-term capital appreciation
- We have created an active, risk-conscious culture to allow us to protect and develop our investors' assets
- We enjoy proven specialist skill acquired over many years in active management of returns and risks
- We provide our investors with the best possible conditions



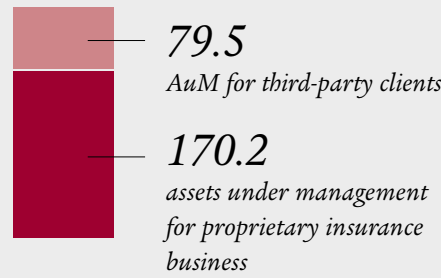
Employees





Assets under management


(in CHF bn)



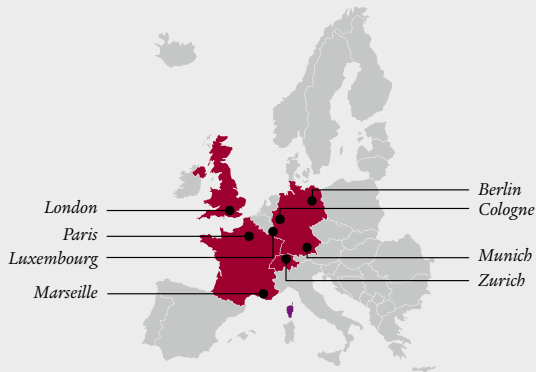
79.5
AuM for third-party clients

170.2
assets under management for proprietary insurance business

250 billion



Strong presence in Europe





You can only get more out of your money by investing it

The first-class investment solutions from Swiss Life

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First-class investment solutions – exactly what’s right for you, even small amounts

Swiss Life

Wealth accumulation

Premium Delegate

Take advantage of our knowledge and do more with your money

Your personal asset management handled by absolute professionals. Working with your advisor, you select your personal investment strategy. From low-risk to high-risk – based entirely on your personal investor profile. You delegate the investment decisions within the selected investment strategy to Swiss Life Asset Managers.

Special feature:
Professional investment management by specialists. You don’t need to worry about anything.

Swiss Life

Wealth accumulation

Premium Preference

Choose an investment theme – we have the right portfolio

There are six investment themes for you to choose from as you create a professionally assembled and monitored fund portfolio. Half of each fund portfolio is comprised of funds related to the selected investment theme, with the other half made up of a core investment (well-diversified strategy funds). In addition, you choose your investment strategies/risk profile yourself, from among the following: Income, Balanced, Growth or Equity.

Special feature:
Select your personal focus from among six investment themes.

Swiss Life

Wealth accumulation

Premium Define

Invest in a first-class fund of your choice

Would you like to invest strategically in a certain asset class, whether as a means of diversification, as risk protection or to access an interesting investment theme? Swiss Life Premium Define offers you the opportunity, with high-quality funds in a range of asset classes, including bonds, convertible bonds and real estate. This product is suitable as a supplement to your existing investments and as a stand-alone solution.

Special feature:
Best option for strategic investment in a specific asset class or investment theme.

Swiss Life

Depletion of assets

Premium PayoutPlan

Benefit from regular payouts from your assets

You invest a one-off amount in the Swiss Life Premium PayoutPlan. This amount is placed in a security-oriented and a return-oriented investment and paid out in accordance with your instructions. Regular reallocations from the return-oriented to the security-oriented investment are performed to comply with your risk profile at all times. You determine the payout amount, the payout periods and the maturity, in self-determination.

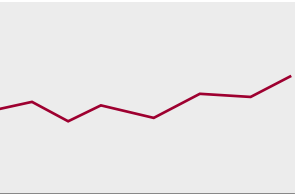
Special feature:
Optimal mix of stability and return potential: Double investment and regular payouts.

Your personal requirements form your investment strategy

Select your personal investment strategy from

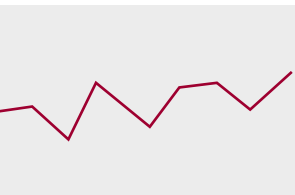
Income

The Income investment strategy tolerates slight fluctuations in assets and exposes the customer to **low risk**. The recommended investment horizon is at least five years.



Balanced

The Balanced investment strategy tolerates moderate fluctuations in assets and exposes the customer to **medium risk**. The recommended investment horizon is at least five years.



Growth

The Growth investment strategy tolerates elevated fluctuations in assets and exposes the customer to **higher risk**. The recommended investment horizon is at least eight years.



Equity

The Equity investment strategy tolerates high fluctuations in assets and exposes the customer to **high risk**. The recommended investment horizon is at least twelve years.



The investment strategies are valid for all products except Swiss Life Premium Define.

Additional information on our investment products may be found here:
[swisslife.ch/en/individuals/themen/geld-anlegen.html](https://www.swisslife.ch/en/individuals/themen/geld-anlegen.html)



How you benefit with our investment products

Premium investment products for everyone

Targeted wealth accumulation even with small amounts

Swiss Life Asset Managers: 160 years of experience

You have access to your assets at any time

Starter account: phased investment of larger sums

Personal & digital management entirely in keeping with your needs

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