

Swiss Life starter account



Challenge and solution

Would you like to combine assets from different sources at Swiss Life and invest them? Then the starter account is the right solution for you. You accumulate a larger amount for an investment solution, Swiss Life Premium Delegate Prime. At the same time, a standing order is set up, which enables you to transfer additional money to the fund/custody account every month.

This is how it works

You invest a certain amount in our investment solution via the starter account – for the first investment at least CHF 250 000 in the first six months. You also define the sum of the amount to be invested every month (following the first investment, at least CHF 5000). This sum is then transferred and invested from the starter account to the Swiss Life Premium Delegate Prime fund/custody account.

How you benefit

- You may transfer savings or payouts from current pension solutions or freely available capital from different sources directly to the starter account for the intended investment in our investment solution.
- The money can be accumulated cost-effectively and efficiently. It can be used as a collective or accumulation account.
- With regular investments via the starter account in the fund/custody account (standing order), you can profit from the cost averaging effect.

Facts and figures

The offer

Type

Starter account with a variable rate of interest. Can only be opened in conjunction with an investment solution with a fund account/custody account.

Suitability

For people aged 18 and over who are domiciled in Switzerland.

Currency

The account is maintained exclusively in CHF.

Account maintenance

Lienhardt & Partner
Privatbank Zürich AG

Minimum transfers*

- Initial minimum investment in the fund/custody account: CHF 250 000 in the first six months
- Regular deposits in the fund/custody account: a minimum of CHF 5000 per month in the first year.

* In the event of non-compliance with these conditions, Swiss Life Wealth Management Ltd and/or the bank may close the starter account and charge a processing fee of CHF 200.

Maximum deposit

CHF 500 000

Fees

Currently, no account maintenance fee. A fixed fee or fee based on the average account balance can be charged for account maintenance with appropriate advance notification.

Account closure

The starter account can be closed at any time.



More information

Are you interested in the Swiss Life starter account? We will be happy to assist you.

Swiss Life Wealth Management Ltd, General-Guisan-Quai 40, P. O. Box, 8022 Zurich

www.swisslife.ch/premiumdelegateprime

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