

Swiss Life Premium Define – *Invest in a first-class fund*

Swiss Life Premium Define enables you to invest in a selected fund from a given investment area – as an individual investment or as an addition to your current investments and according to your risk profile.

Our offer

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 high-quality funds in a range of asset classes including bonds, convertible debt, real estate and commodities. Swiss Life Premium Define lets you invest in a selected individual fund. The investment solution can be used to enhance your existing investments or as a stand-alone solution.

Your advantages

- **Strategic:** Swiss Life Premium Define gives you the opportunity to invest strategically in a specific asset class or investment theme.
- **Quality assurance:** The funds available for selection are subject to continuous quality control.
- **Optimal enhancement:** Swiss Life Premium Define enables you to optimally enhance your current investments.

Facts and figures

What we offer

Type

Fund/custody account with selective individual funds

Suitability

For people age 18 and over who are domiciled in Switzerland for tax purposes

Reference currency

CHF

Account and custody account management

Lienhardt & Partner Privatbank Zürich AG

Range of funds

Compiled by Swiss Life

Risk classes

Fund selection according to your risk profile:
Income, Balanced, Growth, Equity

Saving and dissaving types

Regular deposits, single allocation, withdrawal plan

Minimum deposit

CHF 1000 or
CHF 100 in the case of regular payments
CHF 20 000 in the case of withdrawal plans

Fees and commissions

Acquisition fee: 2%
Flat fee: 0.3% p. a.

Fund switch

Possible at any time free of charge

Deposits and withdrawals

Possible at any time (purchase/sale of fund units
at least once a week)

Account closure

The fund account can be closed free of charge.

The Swiss Life Premium Define funds

These funds are available to you through Swiss Life Premium Define (one fund per contract):

Asset class	Fund name	ISIN	Risk class
Money market fund	Pictet CH-Short-Term Money Market CHF P dy	CH0011292312	Income
Bonds	Swiss Life Bond Euro Corporates CHF hdg R	LU0441499158	Income
	Swiss Life Bond Global Corporates CHF hdg	LU0717900962	Income
	Swiss Life Bond Swiss Francs A1	CH0012162779	Income
	Swiss Life Bond Emerging Mkts Corp CHF hdg	LU1098217992	Income
	Mirabaud Global Strategic Bond Fund AH CHF	LU0963986970	Income
	Templeton Global Total Return Fund CHF hdg	LU0450468185	Growth
Convertible debt	JPM Global Convertibles Fund (EUR) CHF hdg	LU0385794523	Balanced
Real estate	Swiss Life Real Estate Switzerland FoF A2	CH0130611400	Balanced
	SF Sustainable Property Fund	CH0120791253	Balanced
Equities	Swiss Life Equity Global Protect Enhanced	CH0299461969	Growth
	DJE – Gold & Ressourcen PA (EUR)	LU0159550077	Equity
Capital protection	MS Swiss Life Multi Asset Protected Fund	IE00B6RQGX71	Income
Raw materials/gold	ZKB Gold ETF AA CHF	CH0139101593	Growth
	Threadneedle Enhanced Commodities CHF hdg	LU0515768611	Growth



Further information and individual advice

Are you interested in Swiss Life Premium Define?
Your advisor will be happy to help.



- Swiss Life Ltd, General-Guisan-Quai 40, P.O. Box, 8022 Zurich, tel. 043 284 33 11
- www.swisslife.ch/premiumdefine

In the event of any disputes in connection with this investment solution, you may initiate an independent mediation procedure with the Ombudsman. Swiss Life is affiliated to the Verein Ombudsstelle Finanzdienstleister (OFD), Bleicherweg 10, 8002 Zurich.

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