



SwissLife

Swiss Life Premium Delegate

Place your trust in us: in return, our investment experts will give you their best.

Our recommendation

Do you not have the time, experience or interest to follow the performance of the financial markets and invest your assets accordingly? If so, then Swiss Life Premium Delegate is the right choice for you.

Our solutions

With Swiss Life Premium Delegate, you can leave everything in our hands.

This investment solution provides you with access to attractive investment components. Your fund portfolio is compiled and managed by Swiss Life Asset Management Ltd in accordance with your investment strategy.

How you benefit



Flexible

- High availability of your money and switch possible at any time between four different investment strategies
- 24/7 online access to information on all aspects of your investments via the Swiss Life myWorld customer portal



Convenient

- Automatic alignment of your fund portfolio with the investment strategy and current market assessments
- Personal definition of your individual investment strategy from low risk to high risk – based on your objectives



Professional

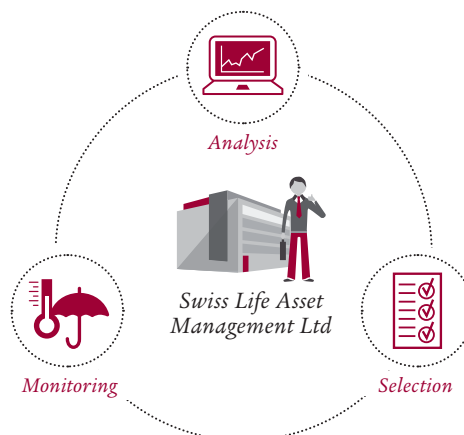
- Professional selection and monitoring of investments by specialists from Swiss Life Asset Management Ltd – even for small amounts
- Optimum diversification and permanent risk management by Swiss Life Asset Management Ltd



Attractive

- Return potential instead of low interest rates
- Cost transparency thanks to an annual all-inclusive fee

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Swiss Life Premium Delegate in brief:

facts and figures

Our offer

Product type	Fund account/custody account with asset management
Suitability	Those aged 18 and over and domiciled in Switzerland
Reference currency	CHF
Account and custody account management	Lienhardt & Partner Privatbank Zürich AG
Asset manager	Swiss Life Asset Management Ltd
Saving and dissaving types	Regular deposits, one-off investment, withdrawal plan
Minimum deposit	CHF 1 000 in the case of a one-off investment, CHF 100 for regular deposits, CHF 20 000 for withdrawal plans
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.
Taxes	The value of the fund units is subject to cantonal wealth tax, fund yields are generally subject to income tax. Private capital gains are tax free.
Investment instruments	Index-tracking and passively managed investment funds (ETFs, index funds) as well as actively managed investment funds
Investment strategies	Choice of four investment strategies: Income, Balanced, Growth, Equity
Selection of funds	By asset manager Swiss Life Asset Management Ltd
Advisory/support services	<ul style="list-style-type: none"> • Comprehensive initial consultation on request – based on your personal circumstances and your objectives • Determination of your individual investment and risk profile • Personal support and advice
Reports	<ul style="list-style-type: none"> • 24/7 online access to information on all aspects of your investments in the Swiss Life myWorld customer portal • Professional investment report and regular market review and outlook • Annual detailed overview of asset and value development as well as a tax statement
Fees and commissions	See Swiss Life Premium Delegate fees and commissions sheet



Further information and individual advice

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



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- swisslife.ch/premiumdelegate or myworld.swisslife.ch

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