



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 Wealth Managers 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 in the 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

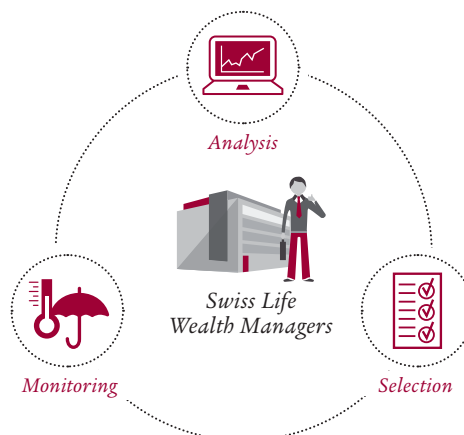
- Professional selection and monitoring of investments by specialists from Swiss Life Wealth Managers – even for small amounts
- Optimum diversification and permanent risk management by Swiss Life Wealth Managers



Attractive

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

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Swiss Life Premium Delegate in brief: *facts and figures*

Our offer

<i>Product type</i>	Fund account/custody account with asset management
<i>Suitability</i>	Those aged 18 and over and domiciled in Switzerland
<i>Reference currency</i>	CHF
<i>Account and custody account management</i>	Lienhardt & Partner Privatbank Zürich AG
<i>Asset manager</i>	Swiss Life Wealth Management Ltd
<i>Saving and dissaving types</i>	Regular deposits, one-off investment, withdrawal plan
<i>Minimum deposit</i>	CHF 1000 in the case of a one-off investment, CHF 100 for regular deposits, CHF 20 000 for withdrawal plans
<i>Deposits and withdrawals</i>	Can be transacted or issued at any time
<i>Purchase/sale of fund units</i>	According to applicable (dis-)investment rhythm
<i>Account closure</i>	The fund account can be closed free of charge.
<i>Taxes</i>	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.
<i>Investment instruments</i>	Index-tracking and passively managed investment funds (ETFs, index funds) as well as actively managed investment funds
<i>Investment strategies</i>	Choice of four investment strategies: Income, Balanced, Growth, Equity
<i>Selection of funds</i>	By asset manager Swiss Life Wealth Management Ltd
<i>Support services</i>	<ul style="list-style-type: none"> • Comprehensive initial consultation – based on your personal circumstances and your objectives • Determination of your individual investment and risk profile • Personal support
<i>Reports</i>	<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
<i>Fees and costs</i>	See list of fees Swiss Life Premium Delegate



More information and a personal consultation – for a financially self-determined life.

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



- Swiss Life Wealth Management Ltd, General-Guisan-Quai 40, P. O. Box, 8022 Zurich
- www.swisslife.ch/en/premiumdelegate

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