

Cost agreement Swiss Life

Effective date: 1 January 2016

This costs agreement is an integral part of the contract of affiliation and the group life insurance contract.

Costs for omissions

When processing transactions, the services listed below are invoiced to the employer directly at the all-in rates listed below and debited to his/her contribution payment account.

	All-in fee in CHF	
Retroactive changes in staff beyond the turn of the year or more than 6 months in the past (excl. disability cases)	Per change	150.00
Registered reminder		100.00
Information to Administrative Board regarding outstanding premiums in accordance with Art. 86b cl. 3 BVG and information to the supervisory authority		200.00
Issue of payment plan		250.00
Debt collection		500.00
Legal proceedings		1 000.00
Request to continue with enforcement proceedings		300.00
Bankruptcy proceedings		500.00

Services for the individually insured person

The following services are invoiced to the insured person directly at the all-in rates listed below, based on the pension fund regulations.

	All-in fee in CHF
Implementing pledge for home ownership	300.00
Implementing prepayment for home ownership	500.00

Other services

The services listed below can be commissioned as required. The Foundation or Swiss Life reserves the right to refuse such an assignment. The costs arising from an assignment are to be charged as shown below. They are invoiced to the employer directly and debited to the contribution payment account. Costs for free fund distribution proposals and implementation of partial liquidations and associated advisory services are charged to the Vorsorgewerk (employee benefits unit).

		Fee in CHF
Retroactive Changes to the pension plan	per case	1 000.00
Continuing a contract without active insured persons	per year	400.00
Distribution of free funds, incl. bonus, in accordance with specific distribution formula (draft and implementation of proposals)	cost per hour	250.00
Implementation of partial liquidation and associated advisory services at Vorsorgewerk level	cost per hour	300.00
Termination of contract		1 000.00
Legal/tax consultancy	cost per hour	300.00 ¹⁾
Special tasks	cost per hour	250.00 ¹⁾

¹⁾ plus value-added tax

Changes to the costs agreement

The costs agreement is an integral part of the Swiss Life group premium rate. Changes to this costs agreement, in particular to the rates and all-in fees, must be authorised by the relevant supervisory authority as rate adjustments. Adjustments to the rates can be made at any time - subject to the necessary authorisation. They are always announced three months before they take effect.

Services by Swiss Life Pension Services Ltd (SLPS)

In accordance with the currently applicable SLPS conditions plus VAT.

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