



SwissLife

Swiss Life Pension Services – *Your strong partner in the background*

Are you looking for *advisory expertise* for the *effective implementation* of your solutions?

With Swiss Life's advisory company – Swiss Life Pension Services – you have a strong and reliable partner on hand to ensure that *your employee benefits institution can always look towards a secure and successful future.*

Advantages for you

Bundled expertise in occupational benefits (2nd pillar)

Swiss Life Pension Services is able to rely on the wealth of experience and comprehensive expertise of its advisors. This gives you the following advantages:

- You get to discuss all issues relating to occupational benefits with expert contact partners.
- You receive the best solution for you and your company.
- You access top-class advisory services.
- You receive our professional support in implementing your solution.

What we offer

Innovative products from a single source at a fair price

We set great store on working with our clients in a spirit of partnership. We are committed to achieving the best possible results for you. Together, we will develop solutions for your employee benefits institution in the following areas:

Actuarial advice

- Funding concepts, designing plans
- Actuarial reports
- Profit and loss analyses
- Risk analyses; reinsurance requirements and concepts
- Optimisation of occupational benefit concepts
- Restructuring concepts
- Advice and support with mergers, (partial) liquidation and distribution plans
- ALM studies and services
- Benchmark studies
- Analysis of occupational benefit obligations within the framework of mergers and acquisitions
- Comprehensive risk management
- Regular modifications to pension fund regulations following changes in the legal requirements
- Local and international accounting (FER 16 & 26, IAS 19/ASC 715 [FAS 87] etc.)
- Key figures system as management tool for your employee benefits institution
- Due diligence review



Corporate monitoring of pension funds –

PensionNavigator®

Boards of Trustees are responsible for their own pension funds. Long-term security and sustainable planning are therefore a prime concern. Professional and forward-looking management creates confidence among all stakeholders. In an increasingly challenging occupational pensions environment, security is highly dependent on expertise, experience and ongoing monitoring. We support you in this task and contribute to the positive development of every employee benefits institution with the *PensionNavigator®*.

Pension governance – management consultation

We fully analyse all the processes in your employee benefits institution and help you to recognise your strengths and potential for improvements early on.

Outsourcing

Depending on your needs, we can fully relieve you of technical administration activities or even assume responsibility for the entire operational management of your pension fund. We also offer innovation and IT solutions.

Legal advice

We support your employee benefits institution with all legal issues and problems.

Training

We provide training for the members of your board of trustees and for your employees working in the area of occupational benefits in line with your specific needs.

Local and international accounting

The compilation of calculations and reports in compliance with IFRS (IAS 19), US GAAP (ASC 715-30) and Swiss GAAP FER 16 & 26 is one of our core competencies. Specialists discuss with you the actuarial and economic assumptions, the results of calculations and their implications for your accounts. If you so wish, we can provide future projections of the relevant key figures in your accounts.

Fair terms and conditions

By bundling our services and thanks to our efficient processes, we can offer you cost advantages and synergies. So why not review your costs and try us out?

Your advantage

Our experience

- Swiss Life Pension Services incorporates the 150 years of experience the Swiss Life Group has built up.
- We are a Swiss company committed to quality and precision.
- Our consultants are members of the Swiss Chamber of Pension Actuaries.
- Our systematic advisory concept guarantees you optimal management of your employee benefits institution in the dynamic field of occupational benefits.
- Thanks to the size of our team, we can provide you with a high level of availability and the full range of advisory services.

Pension Services – Swiss Life's advisory company

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