Swiss Life Pension Services –
Your preferred partner for complex projects

Are you evaluating new pension fund software and need our support? 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 project management and pensions expertise
Swiss Life Pension Services has a strong track record in managing and implementing complex projects, offering you the following advantages:
· You have the opportunity of discussing all project management issues with expert contact partners.
· You receive the best solution for you and your company.
· You access top-class services.
· You receive our professional support in implementing your solution.

What we offer

Innovative services from a single source at a fair price
We set great store on working with our clients in a spirit of partnership and are committed to achieving the best possible results for you. We can provide you with professional support in the following areas:

Management of complex migration projects
· Managing projects involving the migration of pension plans and portfolios of insured persons
· Planning and implementing data fusions in the event of mergers
· Coordinating sub-project activities with other participating companies
· Test strategy, process flows and controlling
· Analysing risks and developing alternative scenarios
· Information and communication activities

Implementation of migration processes
· Designing and testing prototypes
· Analysing source and target systems
· Data plausibility checks
· Checking data consistency before and after migration
· Comparing source and target system data
· Defining conversion rules
· Data controls
· Creating import files
· Testing imports in target system
· Implementing productive migration processes
· Developing and finding solutions for unique cases
· Examining and accepting migrated portfolios
· Archiving data

Evaluation of pension fund software
- Establishing a market overview and identifying suitable providers
- Drawing up a list of requirements
- Short-listing providers
- Defining a list of criteria for in-depth evaluation
- Functional requirements
- Technological requirements
- Project requirements
- Financial requirements
- Commercial requirements
- Drawing up functional specifications for in-depth evaluation
- Drawing up a shortlist of potential providers for a suitable software package based on the detailed function specifications
- Evaluating the basic offers received and prioritising providers according to criteria
- Selecting providers for binding offer requests, presentation and proof of concept
- Creating relevant test cases for proof of concept and demos
- Evaluating presentations and offers
- Presenting the results
- Drawing up recommendations for the board of trustees

Your advantage

Let our experience and professional services work for you
- Swiss Life Pension Services can draw on the 150-year track record of the Swiss Life Group.
- We are a Swiss company committed to quality and precision.
- Our employees are experienced project managers.
- Our systematic approach guarantees you controlled, trackable and documented migration processes.
- Together with you, we draw up a transparent plan of migration activities
- We deliver top-quality data, meaning you cut costs.
- Your pension fund software is tailored to your needs.

Pension Services –
Swiss Life's advisory company

Get in touch:

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