

# Swiss Life Pension Services – *Your outsourcing partner*

*Would you like to be relieved of your technical administration activities or delegate responsibility for all operational management work? 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 management and administration**

Make Swiss Life Pension Services your strong, outsourcing partner. As an experienced provider of management and administration services, we can help you run your employee benefits institution, offering 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 management and administration services.
- You receive internet access to a state-of-the-art administration platform.

## 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. Together with you, we will develop solutions for your employee benefits institution in the following areas:

#### *Commercial administration*

- Foundation bookkeeping in accordance with the legal guidelines
- Preparing the annual accounts (balance sheet, profit and loss account and notes)
- Presenting the annual accounts at the board of trustee's Meeting
- Performance of Investment Controlling

#### *Securities accounting*

- Securities accounting management
- Entering consolidated values from subsidiary accounting (securities and real estate)
- Processing any tax-at-source deductions and settlements with the relevant tax office

#### *Technical administration*

- New company affiliations and new insured persons
- Withdrawals and cessations of affiliation agreements
- Technical entries (single allocations, purchases, prepayments, pledges, etc.)
- Simulation calculations
- Notifications to the Swiss federal tax authorities and preparation of tax certificates for the insured persons
- Maintaining and updating employer data
- Carrying out serial updates
- Data deliveries and data extraction
- Verifying, entering and paying out benefit entitlements
- Examining, calculating and effecting cost of living adjustments
- Year-end processing and salary adjustments
- Managing the technical accounts of the portfolios for insured persons and pensioners
- Various additional services such as electronically archiving updates, pension-specific information, pension fund statistics
- Collecting employee contributions



### *Advisory services*

Our pension actuaries can assist you with actuarial issues and help you develop solutions for pension governance aspects. Matters relating to the international accounting standards also form part of our core business.

### *Operational management*

You can outsource your operational management services to us on a long-term, short-term or case-by-case basis

- Setting up, implementing and monitoring reliable operational procedures
- Developing and implementing an internal control system based on your management key figures
- Liaising with external partners (e.g. supervisory authorities, auditors, etc.)
- Providing regular information to active insured persons and pensioners
- Organising board of trustee meetings (preparation, holding meeting, taking minutes)
- Training and development courses for boards of trustees

### *Migration of systems and insured persons*

- Managing migration project
- Analysing and implementing the planned requirements
- Transferring data
- Data consistency checks
- Testing results and data
- Transferring files and archiving

## Your advantage

### **Our experience**

- Swiss Life Pension Services can draw on the more than 160-years track record of the Swiss Life Group.
- We are a Swiss company committed to quality and precision.
- Our employees are experienced management, administration and accounting specialists.
- Our efficient administrative processes and the electronic archiving of our software guarantees you optimal management of your employee benefits institution in the dynamic field of occupational benefits.
- We guarantee you with a high level of availability and a full range of management and administration services.

## *Pension Services – Swiss Life's advisory company*

### *Get in touch:*

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