

# 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
- Process integration and interfaces to financial accounting, payroll, and HR
- Document management



### *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 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 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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