

### Key figures as of 31.03.2025 \*

Number of contracts of pension clients	1,532
Client assets in CHF mios	426
Regulatory Authority	Zentralschweizer BVG- und Stiftungsaufsicht, Luzern
Auditor	Balmer-Etienne AG, Luzern

\* provisional figures

### Advantages

- ✓ Digital solution for opening and viewing assets
- ✓ Large selection of investment solutions
- ✓ Attractive tax environment for emigration

### Vested benefit account: terms and conditions

Current interest rate	0.41 % p.a.
Keeping of the account	no charge
Withdrawal for home ownership	CHF 400*/600**
Pledging	CHF 0

\* Swiss residents \*\* residents in EU/EFTA member states

### Contact

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### Investment solutions/terms and conditions

#### BVG Fund Invest

Champs ab 0.40 % p.a.  
(maximum CHF 7,500 per year)

#### Index Fund Invest

Selection Index ab 0.45 % p.a.  
(maximum CHF 7,500 per year)

#### Multi Fund Invest

Large selection of investment funds  
authorised for distribution in Switzerland,  
such as ETFs

#### Compare Invest Universe

0.45 % p.a.  
(maximum CHF 7,500 per year)  
CHF 45 Ticket Fee

#### Open Universe

0.60 % p.a.  
(maximum CHF 7,500 per year)  
CHF 60 Ticket Fee

#### Mandate Invest

Asset management mandates with banks,  
securities brokers and asset managers of  
Swiss collective investment funds (KAG/LPCC) 0.45 % p.a.  
(maximum CHF 7,500 per year)

### Tax advantage for emigrants

Account-holders moving permanently abroad benefit from  
the tax-friendly environment offered by Lealta Foundation for  
vested pension benefits in Schwyz.

### Emigration Service

Emigration Service Standard Classic per account	CHF 600
Emigration Service Premium Plus per account	CHF 1,200