A photograph of a man and a woman standing together in a home setting. The man is on the left, wearing a dark sweater over a collared shirt, and the woman is on the right, wearing a polka-dot cardigan over a pink top. They are both smiling warmly at the camera. The background shows a doorway and a framed picture on the wall.

You can  
only get more  
out of your  
money by  
investing it

The first-class  
investment solutions  
from Swiss Life

The SwissLife logo consists of a stylized red graphic element resembling a flame or a ribbon with a white cross inside, positioned above the brand name.

SwissLife

# First-class investment solutions – *exactly what's right for you*

## *Swiss Life Premium Delegate*

Wealth accumulation

### **Take advantage of our knowledge and do more with your money**

Take advantage of our knowledge and do more with your money. Working with your advisor, you select your personal investment strategy from low-risk to high-risk – based entirely on your investor profile. You delegate the investment decisions within selected investment strategy to Swiss Life Wealth Managers.

#### **Special feature:**

Professional investment management by specialists. You don't need to worry about anything.

## *Swiss Life Premium Delegate Prime*

Wealth accumulation

### **Professional asset management from CHF 250 000**

You invest in a professionally managed fund portfolio. You can choose from a core investment and three investment themes, which can be put together and weighted according to your personal needs and preferences. Should your needs change, you can adapt your investment strategy to suit your individual situation.

#### **Special feature:**

Choose the most suitable mix for you from a core investment and three investment themes.



Wealth accumulation

## Swiss Life Premium Preference

### Choose an investment theme – in line with your preferences

There are six investment themes for you to choose for which your investment advisor will create a professionally assembled and monitored fund portfolio. Half of each fund portfolio is comprised of funds related to the selected investment theme, with the other half made up (well-diversified strategy funds). In addition, you choose your personal investment fund portfolio will be managed.

**Special feature:**

Select your personal focus from among six investment themes.

Wealth accumulation

## Swiss Life Premium Define

### Invest in a first-class fund of your choice

Would you like to invest strategically in a certain asset class, whether as a means of diversification, as risk protection or to access an interesting investment theme? Swiss Life Premium Define offers you the opportunity, with high-quality funds in a range of asset classes, including equities, bonds and real estate. This product is suitable as a supplement to your existing investments and as a stand-alone solution.

**Special feature:**

Best option for strategic investment in a specific asset class or investment theme.

Regular income

## Swiss Life Premium PayoutPlan

### Benefit from regular payouts from your assets

You invest a one-off amount in the Swiss Life Premium PayoutPlan. The asset manager places this amount in a security- and return-oriented investment which is paid out in accordance with your instructions. Regular reallocations from the return-oriented to the security-oriented investment are performed to comply with your risk profile at all times. You determine the payout amount, the payout periods and the maturity, in self-determination.

**Special feature:**

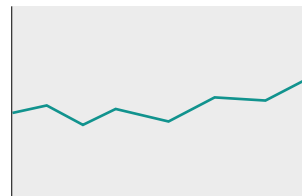
Optimal mix of stability and return potential: Double investment and regular payouts.

# Your personal requirements *form your investment strategy*

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## *Income*

The Income investment strategy tolerates slight fluctuations in assets and exposes the customer to **low risk**. The recommended investment horizon is at least five years.



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## *Balanced*

The Balanced investment strategy tolerates moderate fluctuations in assets and exposes the customer to **medium risk**. The recommended investment horizon is at least five years.



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## *Growth*

The Growth investment strategy tolerates elevated fluctuations in assets and exposes the customer to **higher risk**. The recommended investment horizon is at least eight years.



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## *Equity*

The Equity investment strategy tolerates high fluctuations in assets and exposes the customer to **high risk**. The recommended investment horizon is at least twelve years.



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Additional information on our investment  
products may be found here:

*[swisslife.ch/en/individuals/themen/geld-anlegen.html](https://www.swisslife.ch/en/individuals/themen/geld-anlegen.html)*



# Swiss Life Wealth Management Ltd

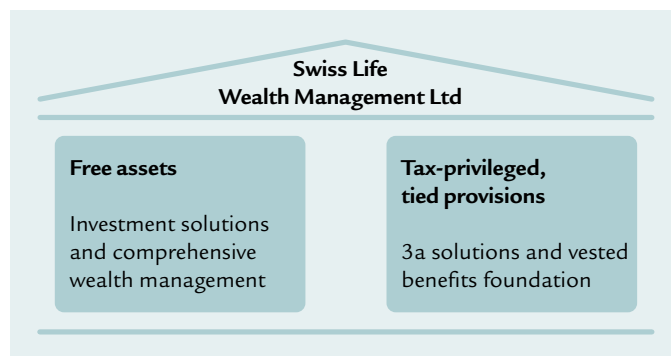
## *The wealth manager for a self-determined life*

### **Who we are**

As an wealth manager for private wealth and investment, we enable our clients to invest strategically to achieve a self-determined life full of financial confidence. They benefit from over 165 years of investment expertise and the financial know-how of an extensive network within the Swiss Life Group. We provide them with comprehensive advice and help them answer important questions about their financial future. So that they can make the right, self-determined decisions – today and tomorrow.

### **Our offer**

We offer our customers comprehensive advice, investment solutions, individual and holistic wealth management services as well as vested benefits and 3a solutions, all of which is tailored to their needs.

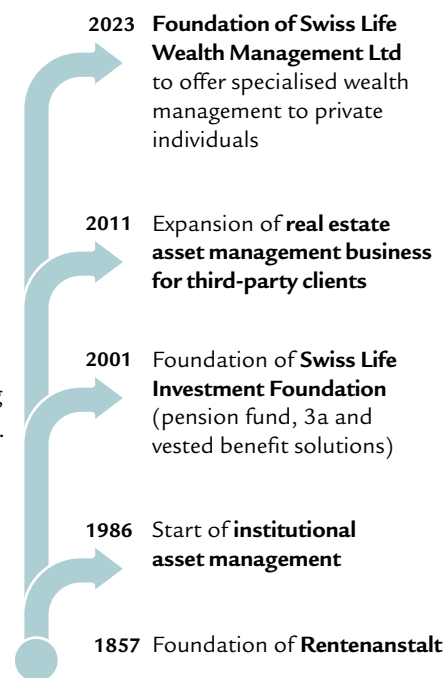


### **What is special about us**

- Reliable and trustworthy since 1857
- Comprehensive network of pension, financial and investment expertise
- Individual solutions for every need, every financial situation and every stage of life
- Comprehensive and personal service
- Target-oriented investing to achieve personal financial goals

### **Our expertise**

With over 165 years of experience in risk and wealth management, Swiss Life has long been a leading force in the industry. Since we started as Rentenanstalt in 1857, we have successfully managed pension fund assets and have long served institutional clients with Swiss Life Asset Managers. With Swiss Life Wealth Management Ltd and its forward-looking advisory and investment solutions, we are now also offering this wealth of expertise to private clients. Our strategies are based on proven methods and innovative approaches that aim to ensure long-term success and stability.



### **Our expertise and competency network**

We have an **extensive network** of **experts** within the Swiss Life Group, including research, financial, investment, sustainability and tax specialists, as well as experienced advisors in the Swiss Life Sales Force and at Swiss Life Wealth Managers.

By being directly included in the investment processes within the Swiss Life Group, we have access to all of its investment expertise and experience.

If you would like to learn more about Swiss Life investment solutions or foundation products, visit us at [swisslife.ch/anlagen](https://www.swisslife.ch/anlagen). Further information on our individual asset advice and management can be found at [swisslife-wealth.ch](https://www.swisslife-wealth.ch).

Legal notice: this document is a marketing document.

# How you benefit *with our investment products*

Premium investment products for everyone

Targeted wealth accumulation even with small amounts

Starter account: phased investment of larger sums

You have access to your assets at any time

Personal & digital management entirely in keeping with your needs

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*We enable people to lead  
a self-determined life.*