

Key figures as of 30.06.2025 *

Number of contracts of pension clients	1,624
Client assets in CHF mios	436
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	0.26% 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

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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