



### Key figures as of 31.12.2025 \*

|  |   |
|--|---|
| Founded on                             | 2009  |
| Number of contracts of pension clients | 2,142   |
| Number of affiliated companies         | 547   |
| Client assets in CHF mios              | 735   |
| Accredited Pension Actuary             | c-alm AG, St. Gallen                                |
| Regulatory Authority                   | Zentralschweizer BVG- und Stiftungsaufsicht, Luzern |
| Auditor                                | Balmer-Etienne AG, Luzern                           |
| Re-insurer                             | Helvetia, Basel                                     |

\* provisional figures

### Convincing Advantages

- ✓ Flexible and customised managerial pension plans
- ✓ Attractive premiums
- ✓ Association solutions for self-employed (OASI)
- ✓ Individual securities solutions; up to 100% in shares
- ✓ Extensive financial and pension plan know-how
- ✓ Multilingual: German/French/English/Italian
- ✓ Online access Liberty Connect

### 1e Flex Invest Foundation terms and conditions

|                                       |                              |
|---------------------------------------|------------------------------|
| Handling fee                          | CHF 100 p.P.; max. CHF 5,000 |
| <b>Fixed rate per member per year</b> |                              |
| Membership administration             | CHF 100 p.P.                 |

### Investment solutions/terms and conditions

#### Low Risk Invest

Investment strategy with gilt-edged bonds, or low-risk investment strategy in accordance with Art. 53a BVV/OPP2

0.25% p.a.

#### BVG Fund Invest (Best in Class)

Champ Max25  
Champ Max40  
Champ Max60  
Champ Max80

0.40% p.a.

#### Index Fund Invest

Selection Index 20  
Selection Index 35  
Selection Index 55  
Selection Index 75  
Selection Index 95

0.45% p.a.

#### Mandate Invest

Asset management mandates with banks, securities brokers and asset managers of Swiss collective investment funds (KAG/LPCC)

0.45% p.a.

### Liberty Pension

#### **Individual**

Costumised to suit your needs

#### **Independent**

Liberty 1e Flex Invest Foundation is entirely independent  
Retrocessions, kickbacks, etc. are credited to the client

#### **Innovative**

Unique pension platform

### Contact

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