

Key figures as of 31.12.2025 *

Number of contracts of pension clients	1,750
Client assets in CHF mios	485
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	0.21 % 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

from 0.40% p.a.
max. CHF 7,500 per year

Index Fund Invest

Selection Index / ESG

from 0.45% p.a.
max. 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.
max. CHF 7,500 per year
CHF 45 Ticket Fee

Open Universe

0.60% p.a.
max. 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.
max. 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