



Key figures as of 31.03.2024 *

Founded on	2009
Number of contracts of pension clients	1,911
Number of affiliated companies	495
Client assets in CHF mios	541
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 80% 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

Fixed rate per member per year

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

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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