



Multi Fund Invest

Your versatile investment solution for experienced investors with vested benefits assets

Invest with flexibility and security – from an investment volume of CHF 250,000

Your advantages at a glance

A wide range of investment options

Choose from a variety of funds, including stocks, bonds, real estate, and alternative investments. This variety allows you to create a well-diversified portfolio that meets your individual investment objectives.

Convenient comparison

Use our "Compare Invest" platform to easily compare around 100 funds selected by Liberty. This saves you time and ensures that you choose the best investment products for your needs.

Regulatory security

Liberty monitors compliance with the BVV2 investment guidelines, as well as those of the foundation so that you can invest with peace of mind.

Secure custodian bank

Your investments are deposited with Graubündner Kantonalbank, a banking institution with a state guarantee.

Strong price/performance ratio

Liberty gives you the opportunity to create your own portfolio and benefit from conditions that are otherwise only available to institutional investors.

Overview of fees

Our transparent fee models ensure that you always have an overview. No hidden costs, everything is open and transparent.

Multi Fund Invest – Compare Invest Universe

All listed funds from Compare Invest Universe:

(all pure funds with a distribution license for Switzerland and daily tradability)

- ✓ Foundation fees: 0.45 % p.a. (max. CHF 625 per month)
- ✓ Ticket fee: CHF 45 per buy and sell order
- ✓ Fund costs (TER): according to the factsheets of the selected funds
- ✓ No limit on the number of products per portfolio

Multi Fund Invest – Open Invest Universe

Access to funds outside des Compare Invest Universe:

(all pure funds with a distribution license for Switzerland and daily tradability)

- ✓ Foundation fees: 0.60 % p.a. (max. CHF 625 per month)
- ✓ Ticket fee: CHF 60 per buy and sell order
- ✓ Fund costs (TER): according to the factsheets of the selected funds
- ✓ No limit on the number of products per portfolio
- ✓ Foundation fees: 0.60 % p.a. (max. CHF 625 per month) on the total invested capital once at least one Open Universe fund is selected

Why Multi Fund Invest?

Multi Fund Invest gives you access to a wide range of investment funds that will help you build a diversified and robust portfolio. Rely on Liberty's many years of experience and excellent service to help you achieve your investment goals. Our customized solutions offer you the flexibility you need for your investment decisions.

Contact us today and discover the advantages of Multi Fund Invest!