

Key figures as of 30.09.2024 *

Number of contracts of pension clients	1 346
Client assets in CHF mios	381
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	0.70% 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 Liberty Foundation for Vested Pension Benefits in Schwyz.

An online withholding tax calculator is at your disposal under Emigration Service at lealta.ch. In addition to other interesting information, you can easily compare the withholding tax rates of all the Swiss cantons and calculate your savings online.

Emigration Service

Emigration Service Standard Classic per account	CHF 600
Emigration Service Premium Plus per account	CHF 1,200