

The independent pension platform

Change in Strategy for BVG/LPP Fund Invest

Vested benefit account/deposit

Account/deposit number

Client particulars

Name First Name

Change in Investment Strategy

I hereby instruct Liberty Foundation for Vested Pension Benefits (the "Foundation") to execute the following change in strategy:

Current investment strategy	Investment strategy in % equities	Breakdown
Cash (at least 5%)		_____ %
Sarasin Investment Foundation	<input type="checkbox"/> 15 <input type="checkbox"/> 25 <input type="checkbox"/> 35 <input type="checkbox"/> 45 <input type="checkbox"/> Oeko 25 <input type="checkbox"/> Oeko 40	_____ %
Credit Suisse Investment Foundation	<input type="checkbox"/> 0 <input type="checkbox"/> 25 <input type="checkbox"/> 25 plus <input type="checkbox"/> 35 <input type="checkbox"/> 45 <input type="checkbox"/> Index 45	_____ %
IST Investment Foundation	<input type="checkbox"/> 15 <input type="checkbox"/> 25 <input type="checkbox"/> 35	_____ %
Pictet Funds AG	<input type="checkbox"/> 25 <input type="checkbox"/> 40	_____ %
Swisscanto Investment Foundation	<input type="checkbox"/> 10 <input type="checkbox"/> 25 <input type="checkbox"/> 45 <input type="checkbox"/> Oeko 45	_____ %
Winterthur AWi Investment Foundation	<input type="checkbox"/> 25 <input type="checkbox"/> 35 <input type="checkbox"/> 45	_____ %
Zurich Investment Foundation	<input type="checkbox"/> 25 <input type="checkbox"/> 35 <input type="checkbox"/> 45	_____ %
Privatbank Reichmuth & Co	<input type="checkbox"/> Voralpin <input type="checkbox"/> Alpin <input type="checkbox"/> Real Unit	_____ %
Aquila & Co. AG (Apenso)	<input type="checkbox"/> 25 <input type="checkbox"/> 40	_____ %
Swiss Life Investment Foundation	<input type="checkbox"/> 15 <input type="checkbox"/> 25 <input type="checkbox"/> 35 <input type="checkbox"/> 45	_____ %
Arecon AG	<input type="checkbox"/> Strategy Fund 4-7% BVV2	_____ %
UBS Investment Foundation	<input type="checkbox"/> 12 <input type="checkbox"/> 25 <input type="checkbox"/> 40 <input type="checkbox"/> Ind. 12 <input type="checkbox"/> Ind. 25 <input type="checkbox"/> Ind. 40	_____ %

New investment strategy effective from _____	Investment strategy in % equities	Breakdown
Cash (at least 5%)		_____ %
Sarasin Investment Foundation	<input type="checkbox"/> 15 <input type="checkbox"/> 25 <input type="checkbox"/> 35 <input type="checkbox"/> 45 <input type="checkbox"/> Oeko 25 <input type="checkbox"/> Oeko 40	_____ %
Credit Suisse Investment Foundation	<input type="checkbox"/> 0 <input type="checkbox"/> 25 <input type="checkbox"/> 25 plus <input type="checkbox"/> 35 <input type="checkbox"/> 45 <input type="checkbox"/> Index 45	_____ %
IST Investment Foundation	<input type="checkbox"/> 15 <input type="checkbox"/> 25 <input type="checkbox"/> 35	_____ %
Pictet Funds AG	<input type="checkbox"/> 25 <input type="checkbox"/> 40	_____ %
Swisscanto Investment Foundation	<input type="checkbox"/> 10 <input type="checkbox"/> 25 <input type="checkbox"/> 45 <input type="checkbox"/> Oeko 45	_____ %
Winterthur AWi Investment Foundation	<input type="checkbox"/> 25 <input type="checkbox"/> 35 <input type="checkbox"/> 45	_____ %
Zurich Investment Foundation	<input type="checkbox"/> 25 <input type="checkbox"/> 35 <input type="checkbox"/> 45	_____ %
Privatbank Reichmuth & Co	<input type="checkbox"/> Voralpin <input type="checkbox"/> Alpin <input type="checkbox"/> Real Unit	_____ %
Aquila & Co. AG (Apenso)	<input type="checkbox"/> 25 <input type="checkbox"/> 40	_____ %
Swiss Life Investment Foundation	<input type="checkbox"/> 15 <input type="checkbox"/> 25 <input type="checkbox"/> 35 <input type="checkbox"/> 45	_____ %
Arecon AG	<input type="checkbox"/> Strategy Fund 4-7% BVV2	_____ %
UBS Investment Foundation	<input type="checkbox"/> 12 <input type="checkbox"/> 25 <input type="checkbox"/> 40 <input type="checkbox"/> Ind. 12 <input type="checkbox"/> Ind. 25 <input type="checkbox"/> Ind. 40	_____ %

NB If the existing risk profile has been exceeded (e.g. by an increase in the equities or foreign exchange content), a new risk profile must be filled in and presented. Otherwise, the desired change in strategy cannot be made.

Signature

Place, date

Signature Client/representative/asset manager

Attachments

- New risk check and risk profile if the existing risk profile has been overstepped.