



Key figures as of 30.06.2024 *

Founded on	2009
Number of contracts of pension clients	2,529
Number of affiliated companies	558
Client assets in CHF mios	303
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

Advantages

- ✓ No minimum premium
- ✓ Attractive premiums
- ✓ Flexible main plans and managerial plans
- ✓ Association solutions for self-employed (OASI)
- ✓ Extensive financial and pension plan know-how
- ✓ Multilingual: German/French/English/Italian

BVG Collective Foundation terms and conditions

The interest rate for 2023 will be determined by the Board of Trustees at the end of the year.

Fixed rates per member per year

1 to 49 employees	CHF 350
50 to 149 employees	CHF 300
150 to 499 employees	CHF 250
500 employees and over	CHF 175

Investment solutions/terms and conditions

BVG Pool Invest

From 1 employee on possible
Common investment pool
Uniform coverage ratio per pool
Uniform interest rate per pool

Mandate Invest

From CHF 8mn in total pension assets and 50 employees

Asset management mandates with banks, securities brokers and asset managers of Swiss collective investment funds (KAG/LPCC)

Separate financial statements under GAAP FER 26

BVV2/OPP2 compliance monitored by the Foundation

0.25% p.a.

Liberty Pension

Individual

Costumed to suit your needs

Independent

BVG collective foundation is entirely independent
Retrocessions, kickbacks, etc. are credited to the client

Innovative

Unique pension platform

Contact

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