



# tellico

Pension solutions. Banking. Real estate.

## Tellico pension solutions 1e

Bahnhofstrasse 4 t +41 58 442 64 00  
Postfach 713 vorsorge1e@tellico.ch  
CH-6431 Schwyz tellico.ch

## Change in strategy

---

Client number			
Surname			
First Name			
Street			
Postcode, Place		Country	

---

**Current investment strategy**

**New investment strategy**

**New investment strategy effective from**

I hereby instruct Tellico pension solutions 1e to manage my pension assets according to the previously selected investment strategy, which corresponds to my risk profile and the Asset Management Agreement.

I confirm that I have received, read, understood and accepted the general terms and conditions and safe custody regulations.

I confirm that I have been informed regarding the risks associated with the performance of this Asset Management Agreement and the risks inherent in securities trading, and that I have received, read and understood the Special Risks in Securities Trading brochure currently in effect, as published by the Swiss Bankers Association.

By signing the Asset Management Agreement, all parties ensure their compliance with Articles 49 to 58 of the Swiss Occupational Pensions Ordinance («OPO 2» – Verordnung über die berufliche Alters-, Hinterlassenen- und Invalidenvorsorge, BVV 2).

Comments

---

### Declaration

I hereby confirm that Tellico pension solutions 1e has informed me that I am not entitled to any minimum interest rate or capital preservation guarantee with respect to my pension assets. In particular, I am willing to take on increased market risks depending on the previously selected investment strategy, and am aware that the investment opportunities will be broadened as per OPO 2. I alone bear these risks as per the regulations in Article 17 of the Swiss Vested Benefits Act (Freizügigkeitsgesetz – FZG). Upon exiting the Foundation (whether due to a change of employment, termination of the affiliation agreement, etc.) I will receive the current value of my pension assets and will not be entitled to any statutory minimum.

All legal relations are governed by and construed in accordance with Swiss law. The place of performance is Schwyz.

---

Place, date

Signature of the insured

### Enclosures

Risk assessment