



Change in strategy

Client number

Surname

First Name

Street

Postcode, Place Country

Current investment strategy

New investment strategy effective from

Strategy selection «Standard»

Cash (fix) %

Core strategy (must amount to a minimum of 70 %)

	ISIN N°.	Risk profile	Allocation
<input type="checkbox"/> Tellco Low risk	CH0450197527	Low risk	<input type="text"/> %
<input type="checkbox"/> Tellco 10	CH0450199770	Interest income	<input type="text"/> %
<input type="checkbox"/> Tellco 25	CH0450201261	Income	<input type="text"/> %
<input type="checkbox"/> Tellco 45	CH0450201329	Balanced	<input type="text"/> %
<input type="checkbox"/> Tellco 70	CH0450382608	Growth	<input type="text"/> %
<input type="checkbox"/> Tellco 100	LU0950674332	Capital gains	<input type="text"/> %

Satellite strategy (maximum amount permissible 28 %)

	ISIN N°.	Provider	Subject	Allocation
<input type="checkbox"/> Satellite 1	IE00BYZK4669	BlackRock	iShares Ageing Population	<input type="text"/> %
<input type="checkbox"/> Satellite 2	IE00BYZK4552	BlackRock	iShares Automation & Robotics	<input type="text"/> %
<input type="checkbox"/> Satellite 3	IE00BYZK4776	BlackRock	iShares Healthcare Innovation	<input type="text"/> %
<input type="checkbox"/> Satellite 4	IE00BYZK4883	BlackRock	iShares Digitalisation	<input type="text"/> %
<input type="checkbox"/> Satellite 5	IE00BDR5H412	UBS	Global Gender	<input type="text"/> %
<input type="checkbox"/> Satellite 6	LU1273641503	UBS	Socially Responsible	<input type="text"/> %

Total must yield 100 %.

The investment strategy selected by me

corresponds to my risk profile (please enclose).

does not correspond to my risk profile.

Reason for deviation:



Strategy selection «Individual»

Insured persons with vested benefits of CHF 500.000 or more also have the opportunity, in addition to the standard solutions using Tellco strategy funds, either to manage their vested benefits custody account themselves using collective investment instruments (ETFs, funds, investment foundations) or to allow an asset manager to do so. This leads to the following option:

Asset management services

I hereby grant power of attorney to one of the banks, securities dealers, fund managers or asset managers of collective capital investments subject to the Swiss Financial Market Supervisory Authority FINMA to invest and manage my vested benefits in accordance with the guidelines specified in OPO2 (please attach the signed Asset Management Agreement).

Individual fund custody account (execution only)

I will manage my vested benefits myself within the framework of my risk profile and with due consideration given to the Swiss Occupational Pensions Ordinance (OPO 2) guidelines. The foundation will authorize securities orders (acquisitions, sales) and will be the sole issuer of the orders. Once my vested benefits have been transferred, my custody account should be built up as follows:

Fund depot

Cash (fix)

2 %

Fund name	ISIN N°.	Provider	Allocation
			%
			%
			%
			%
			%
			%

The investment strategy selected by me

corresponds to my risk profile (please enclose).

does not correspond to my risk profile.

Reason for deviation:

Declaration

I hereby confirm that the Tellco Vested Benefits Foundation 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 the Swiss Occupational Pension Ordinance (OPO 2; Verordnung über die berufliche Alters-, Hinterlassenen- und Invalidenvorsorge, BVV 2). I alone bear these risks as per the regulations in Article 17 of the Swiss Vested Benefits Act (VBA; 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

Place, Date

Signature of the adviser (if available)