



tellco

Pension solutions. Banking. Real estate.

Tellco Vested Benefits Foundation
Bahnhofstrasse 4 t +41 58 442 62 00
Postfach 713 fzs@tellco.ch
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Strategy selection «Individual» Annex to custody account opening with the Tellco Vested Benefits Foundation

The insured

Surname Given name

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 OPO 2 (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 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) %

Fund name	ISIN N°	Provider	Allocation
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> %

I hereby declare that I have answered all questions truthfully, added up all of the points received and understood the risk profile assigned to the overall score as well as the corresponding investment strategy.

The investment strategy selected by me

corresponds to my risk profile (please enclose).

does not correspond to my risk profile.

Reason for deviation:



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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)