



# Order Securities Investment

I hereby issue to J. Safra Sarasin Vested Benefits Foundation, Basel a

**single investment instruction**

for the subfund

<input type="checkbox"/> <b>LPP Yield</b>	<input type="checkbox"/> Buy	<input type="checkbox"/> units to the value of CHF _____	<input type="checkbox"/> for the entire balance
	<input type="checkbox"/> Sell	<input type="checkbox"/> number of units	<input type="checkbox"/> all units
<input type="checkbox"/> <b>LPP Income</b>	<input type="checkbox"/> Buy	<input type="checkbox"/> units to the value of CHF _____	<input type="checkbox"/> for the entire balance
	<input type="checkbox"/> Sell	<input type="checkbox"/> number of units	<input type="checkbox"/> all units
<input type="checkbox"/> <b>LPP Growth</b>	<input type="checkbox"/> Buy	<input type="checkbox"/> units to the value of CHF _____	<input type="checkbox"/> for the entire balance
	<input type="checkbox"/> Sell	<input type="checkbox"/> number of units	<input type="checkbox"/> all units
<input type="checkbox"/> <b>LPP Future</b>	<input type="checkbox"/> Buy	<input type="checkbox"/> units to the value of CHF _____	<input type="checkbox"/> for the entire balance
	<input type="checkbox"/> Sell	<input type="checkbox"/> number of units	<input type="checkbox"/> all units
<input type="checkbox"/> <b>LPP Equities 80</b> (non-BVV2-compliant)	<input type="checkbox"/> Buy	<input type="checkbox"/> units to the value of CHF _____	<input type="checkbox"/> for the entire balance
	<input type="checkbox"/> Sell	<input type="checkbox"/> number of units	<input type="checkbox"/> all units
<input type="checkbox"/> <b>LPP Sustainability Income</b>	<input type="checkbox"/> Buy	<input type="checkbox"/> units to the value of CHF _____	<input type="checkbox"/> for the entire balance
	<input type="checkbox"/> Sell	<input type="checkbox"/> number of units	<input type="checkbox"/> all units
<input type="checkbox"/> <b>LPP Sustainability</b>	<input type="checkbox"/> Buy	<input type="checkbox"/> units to the value of CHF _____	<input type="checkbox"/> for the entire balance
	<input type="checkbox"/> Sell	<input type="checkbox"/> number of units	<input type="checkbox"/> all units

**permanent investment instruction**

All account balances will be invested in the selected main strategy until further notice.

for the subfund

<input type="checkbox"/> <b>LPP Yield</b>	<input type="checkbox"/> <b>LPP Growth</b>	<input type="checkbox"/> <b>LPP Equities 80</b> (non-BVV2-compliant)	<input type="checkbox"/> <b>LPP Sustainability Income</b>
<input type="checkbox"/> <b>LPP Income</b>	<input type="checkbox"/> <b>LPP Future</b>		<input type="checkbox"/> <b>LPP Sustainability</b>

**instruction to switch**

(number of units) from **LPP** to **LPP**

in the «J. Safra Sarasin Investment Foundation», Basel, at the acquisition price set on the subsequent valuation date. For the portion of assets invested in rights, there is no entitlement to a minimum interest payment or capital preservation.

**Your risk profile**

The investment group’s strategic equities quota allows you to select an investment strategy at any time that matches your risk profile (risk capacity and risk tolerance).

Risk capacity is an investor’s ability to weather fluctuations in value and withstand losses on his investments without falling into financial hardship. The less an investor relies on his invested capital to meet his obligations, the greater his risk capacity is.

Risk tolerance refers to the extent to which an investor’s own willingness to tolerate fluctuations in value – profit/loss – and take risks in exchange for a potentially higher return.

If there are major changes to your personal circumstances (advancing age, retirement, income, marital status, inheritance, etc.) and you have to readjust your current investment strategy, simply switch to the strategy that suits you best.

If your investment decision deviates from your risk profile and you opt for a different investment strategy, you will have to bear the associated risks yourself.

**Modules in the «Traditional LPP Life Cycle»**

Subfund	Strategic equities quota	Equities bandwidth	Investment horizon
<b>LPP Yield</b>	15%	10-20%	min. 1 year
<b>LPP Income</b>	25%	20-30%	min. 5 years
<b>LPP Growth</b>	35%	30-40%	min. 10 years
<b>LPP Future</b>	45%	40-50%	min. 10 years
<b>LPP Equities 80</b> (non-BVV2-compliant)	80%	50-95%	min. 15 years

**Modules in the «Sustainable LPP Life Cycle»**

Subfund	Strategic equities quota	Equities bandwidth	Investment horizon
<b>LPP Sustainability Income</b>	25%	10-35%	min. 5 years
<b>LPP Sustainability</b>	38%	25-50%	min. 10 years

**Supplementary information on «LPP Equities 80 – non-BVV2-compliant»**

The equity exposure and fluctuations in value (profit/loss) for this new investment strategy are much higher than for conventional pension products. That is why the investment group is suited to investors with a corresponding risk profile and/or long investment horizon.

I have noted the contents of the Supplementary Regulations for J. Safra Sarasin Vested Benefits Foundation governing securities investments and accept them in full. I hereby authorise J. Safra Sarasin Vested Benefits Foundation, to notify any intermediary involved in settling the transaction with details of the vested benefits account/securities investment.

Account no. \_\_\_\_\_

Account name \_\_\_\_\_

Place, date \_\_\_\_\_

Signature \_\_\_\_\_

**Enclose actual signed copy of passport / ID of accountholder.**

Please return this form to J. Safra Sarasin Vested Benefits Foundation, Elisabethenstrasse 62, P.O. Box, CH-4002 Basel

**J. Safra Sarasin Vested Benefits Foundation**

Elisabethenstrasse 62, P.O. Box

4002 Basel

Managing Director: Hanspeter Kämpf

[www.jsafrasarasins.ch/vorsorge](http://www.jsafrasarasins.ch/vorsorge)**Your contacts for administrative and legal queries**

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