



# Order Securities Investment

## Flexible investment

Once-only buy orders allow you to determine the timing of investments and the amount to be invested yourself. With a permanent buy order, we invest every deposit you make directly in the strategy of your choice.

You can switch between once-only orders and a permanent order at any time. You are also free to split your pension assets between several strategies and/or move from one strategy to another free of charge.

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

once-only buy order for the investment group

<input type="checkbox"/> LPP Yield	<input type="checkbox"/> Buy	<input type="checkbox"/> units to the value of CHF _____	<input type="checkbox"/> Zc f h Y t c h U U W t i b h V U U b W
	<input type="checkbox"/> Sell	<input type="checkbox"/> Numbers of units _____	<input type="checkbox"/> a l l i b ] r g
<input type="checkbox"/> LPP Income	<input type="checkbox"/> Buy	<input type="checkbox"/> units to the value of CHF _____	<input type="checkbox"/> Zc f h Y t c h U U W t i b h V U U b W
	<input type="checkbox"/> Sell	<input type="checkbox"/> Numbers of units _____	<input type="checkbox"/> a i i b ] r g
<input type="checkbox"/> LPP Growth	<input type="checkbox"/> Buy	<input type="checkbox"/> units to the value of CHF _____	<input type="checkbox"/> Zc f h Y t c h U U W t i b h V U U b W
	<input type="checkbox"/> Sell	<input type="checkbox"/> Numbers of units _____	<input type="checkbox"/> U i i b ] r g
<input type="checkbox"/> LPP Future	<input type="checkbox"/> Buy	<input type="checkbox"/> units to the value of CHF _____	<input type="checkbox"/> Zc f h Y t c h U U W t i b h V U U b W
	<input type="checkbox"/> Sell	<input type="checkbox"/> Numbers of units _____	<input type="checkbox"/> a i i b ] r g
<input type="checkbox"/> LPP Equities 80 - non OPO2 compliant	<input type="checkbox"/> Buy	<input type="checkbox"/> units to the value of CHF _____	<input type="checkbox"/> Zc f h Y t c h U U W t i b h V U U b W
	<input type="checkbox"/> Sell	<input type="checkbox"/> Numbers of units _____	<input type="checkbox"/> a i i b ] r g
<input type="checkbox"/> LPP Sustainability Income	<input type="checkbox"/> Buy	<input type="checkbox"/> units to the value of CHF _____	<input type="checkbox"/> Zc f h Y t c h U U W t i b h V U U b W
	<input type="checkbox"/> Sell	<input type="checkbox"/> Numbers of units _____	<input type="checkbox"/> a i i b ] r g
<input type="checkbox"/> LPP Sustainability	<input type="checkbox"/> Buy	<input type="checkbox"/> units to the value of CHF _____	<input type="checkbox"/> Zc f h Y t c h U U W t i b h V U U b W
	<input type="checkbox"/> Sell	<input type="checkbox"/> Numbers of units _____	<input type="checkbox"/> a i i b ] r g

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LPP Yield _____%	LPP Growth _____%	<input type="checkbox"/> LPP Equities 80 _____%	LPP Sustainability Income _____%
LPP Income _____%	LPP Future _____%	- non OPO2 compliant	LPP Sustainability _____%

## Instruction to switch

(Numbers) 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 strategic equity quota of the investment group enables the insured to select an investment strategy consistent with his risk profile (risk capacity and risk tolerance) at any time.

**Risk capacity** (age, financial circumstances, investment horizon) refers to an investor's ability to withstand fluctuations in value and losses on his investments without suffering financial hardship. The less an investor depends on his invested capital to meet his obligations, the greater his risk capacity.

**Risk tolerance** (experience with investments, dealing with falls in value, expectations in terms of returns) refers to the extent to which an investor is prepared to tolerate fluctuations in value – gain/loss – and take risks in order to achieve a potentially higher return.

In the event of any major changes in the insured's personal circumstances (advancing age, retirement, income, marital status, inheritance, etc.) which necessitate a re-adjustment of his current investment strategy, he can simply switch to the investment strategy appropriate to him. If the insured's investment decision does not match his risk profile and he opts for a different investment strategy, this will be at his own risk.

**The «traditional LPP life cycle»**

Investment group	Strategic equity component	Equity bandwidth	Investment horizon
LPP Yield	15%	0-20%	min. 1 year
LPP Income	25%	10-30%	min. 5 years
LPP Growth	35%	20-40%	min. 10 years
LPP Future	45%	30-50%	min. 10 years
LPP Equities 80 - non OPO2 compliant	80%	50-95%	min. 15 years

**The «sustainable LPP life cycle»**

Investment group	Strategic equity component	Equity bandwidth	Investment horizon
LPP Sustainability Income	25%	10-35%	min. 5 years
LPP Sustainability	38%	20-50%	min. 10 years

**Supplementary information on «LPP Equities 80 – non-OPO2–compliant»**

This investment strategy has a significantly higher proportion of equities and involves significantly greater fluctuations in value (gains/ losses) than conventional pension products. The investment class is therefore suitable for investors with a matching risk profile and/or an investment horizon of at least 15 years.

**Regulations**

In all other respects, the legal relationship between the Foundation and the insured is governed by the most recent version of the Foundation's Regulations. The insured confirms that he is in possession of a copy of said regulations. The insured has taken note of the Regulations of the J. Safra Sarasin Vested Benefits Foundation, including the appendices, and is in full agreement with their contents.

**Disclosure of data to any acquisition agent**

The insured authorises the Foundation to provide the acquisition agent and the Bank or its affiliated companies (in particular wholly-owned subsidiaries or companies with a BJSS majority stake with head offices in Switzerland) with data on this Vested Benefits account and the securities investments. The purpose of this data processing is to enable the insured to benefit from the comprehensive range of services offered by the data recipients.

Account no.

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Account name

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Telephone/

E-mail address for questions:

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Place, date

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Signature

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**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

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Managing Director: Hanspeter Kämpf

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