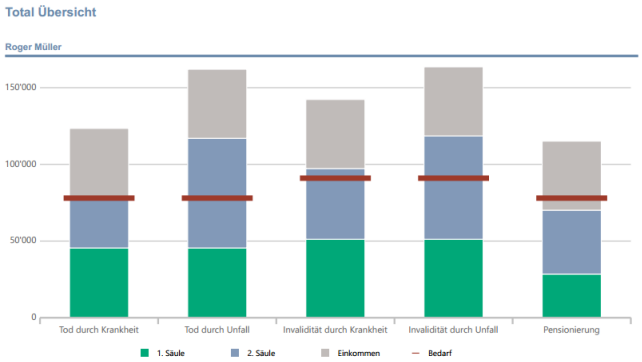


Pension planning analysis / Risk analysis

Through an independent pension and risk analysis, we provide you with an overview of your personal insurance situation.

Angebot:

- Pension and risk analysis for the risks of incapacity for work, death and old age
- A detailed and clear overview of the services to be provided
- Identifying any gaps in pension provision or over-insurance
- Illustrating changes in benefits using simulations of additional insurance and / or savings solutions



The procedure is as follows

Phase 1
- Getting in touch
- Submission of documents – confirmation of receipt and completeness

Phase 2 (approx. 3 weeks)
- Preparation of the pension analysis by SRB Assekuranz Broker AG
- Arrangement for a meeting at SRB Assekuranz Broker AG or online

Phase 3
- Interactive presentation oft he analysis
- Outlining the current situation and simulating possible scenarios
- Delivery of the pension analysis by email or in paper form

The following documents are required:

- Pay slips
- Details of continued pay (Employment Contract / Annex to the Employment Contract)
- AHV – ID cards
- Current pension scheme statements
- Pillar 3a and 3b life insurance policies
- Other pension assets (e.g. Pillar 3a account)
- Health insurance certificates
- Assets (e.g. bank accounts, property)
- Further information
    - Dates of birth of all individuals / Date of marriage / Length of service and place of employment

Contact person

Martin Meili, email martin.meili@srb.ch or tel: +41 44 497 87 24, is on hand to assist you, handle your enquiries and provide you with detailed information on all aspects of the analysis.

Brokerslink Partner

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