

## **Swiss Life Preferred Plus**

### **Getting started with the new portal**

05.2021

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## Welcome to Swiss Life Preferred Plus

*Swiss Life Preferred Plus* is an online portal for companies to access and administer their employee benefits plans, and for their employees to consult and manage their risk and pension benefits 24/7.

### **As an Employer – Simplify your plans administration tasks**

*Swiss Life Preferred Plus* helps companies streamline the daily employee benefits administration tasks such as (de-)enrolment and renewal, including information viewing and sharing.

### **As a Member – Manage your policies in one place**

*Swiss Life Preferred Plus* allows employees view and manage the retirement and risk benefits defined by their employer, and download documents related to their plan such as individual statements.



one place



24/7 access



data management

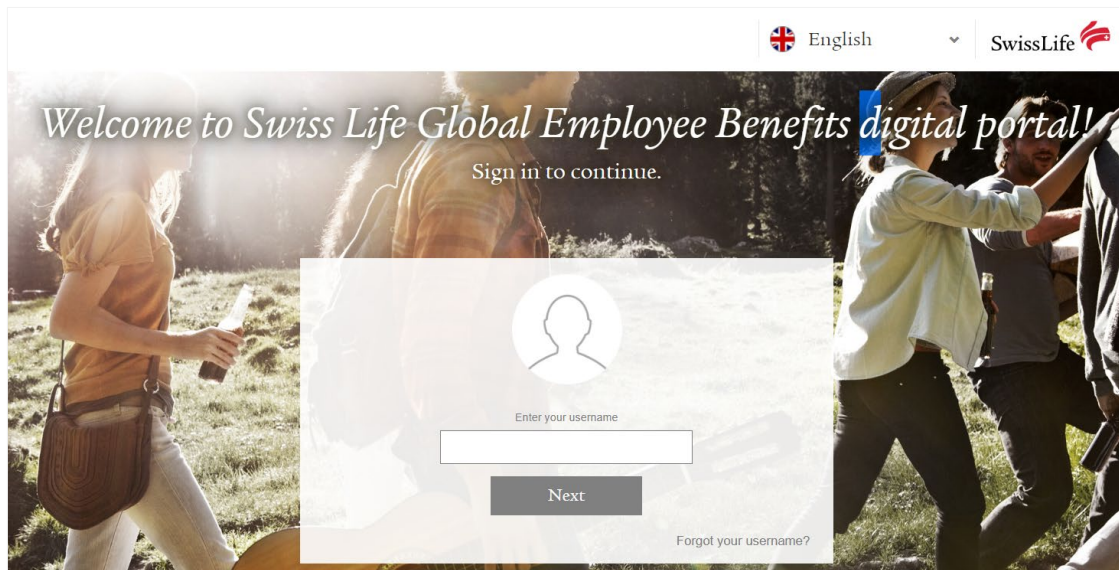


documents download

## Access your portal

### First login to Swiss Life Preferred Plus

Connect to <https://preferredplus.swisslife.com> (Firefox or Google Chrome recommended – minimum screen resolution is 1280x720 for an optimal browsing experience) and follow the below secure procedure using your current login details:



- ❶ Fill in your username
- ❷ Enter the email address associated with your account
  - ❶ You will receive an email with a link to continue the login procedure only if the username and the given email address match
- ❸ Check your mailbox and click on the link provided to continue the login procedure
- ❹ Set your password
  - ❶ Password requirements:
    - minimum 10 characters
    - minimum 2 digits
    - minimum 1 special character
    - minimum 2 letters (at least one uppercase and one lowercase)
- ❺ You will be redirected to the authentication platform
  - ➔ Install an authentication app on your mobile phone (such as Microsoft Authenticator, Authenticator or 2FA Authenticator)
  - ➔ Scan the QR code on the screen using your mobile phone to link your Swiss Life Preferred Plus account to the authentication app
  - ➔ Input the 6-digit code that the authentication app generates on the authentication platform to log in to Swiss Life Preferred Plus
- ❻ Accept the General Conditions of accessibility and use

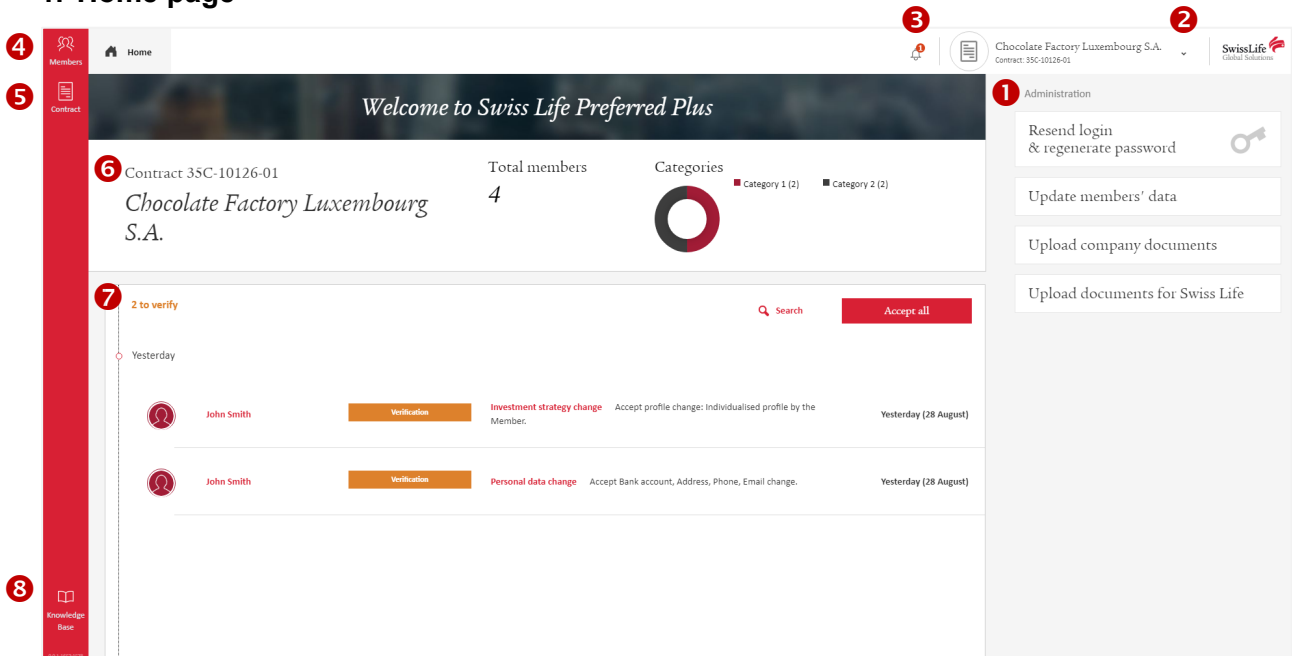
### From next connection onward

Follow the secure 3-step procedure:

- ❶ Enter your username
- ❷ Enter your password
- ❸ Launch the authentication app on your mobile phone and input the 6-digit code generated in the authentication platform

# Employer portal

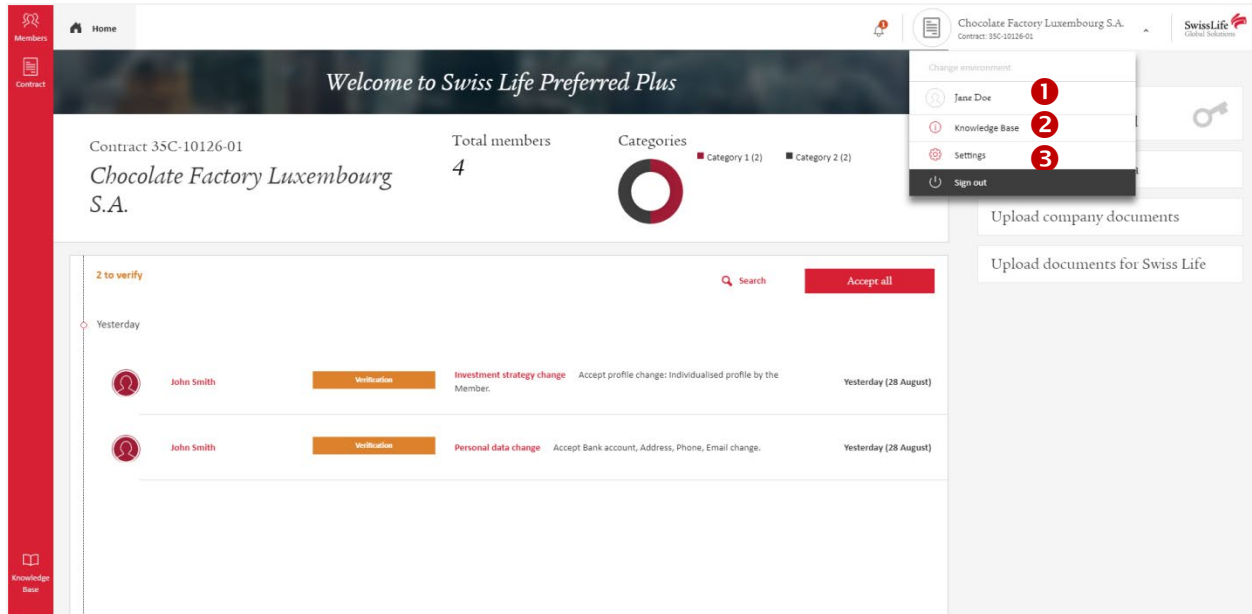
## 1. Home page



The screenshot shows the home page of the SwissLife Preferred Plus Employer Portal. The interface includes a top navigation bar with a 'Home' button and a user profile dropdown for 'Chocolate Factory Luxembourg S.A.'. A central dashboard displays contract information for 'Chocolate Factory Luxembourg S.A.' (Contract: 35C-10126-01), showing 4 total members and a pie chart for categories. A '2 to verify' section lists pending verification tasks for John Smith, including an investment strategy change and a personal data change. A right-hand sidebar contains administrative tools like 'Resend login & regenerate password', 'Update members' data', and document upload options. A left-hand navigation menu includes 'Members', 'Contract', and 'Knowledge Base'.

- ❶ Shortcuts to the tools you may regularly use
- ❷ Change your role or your personal settings
- ❸ Consult the last notifications
- ❹ Search for members and manage their data or policies
- ❺ Consult or administer your company contract
- ❻ Contract information at a glance
- ❼ List of open tasks
- ❽ Access guides, tutorials and helpful informations

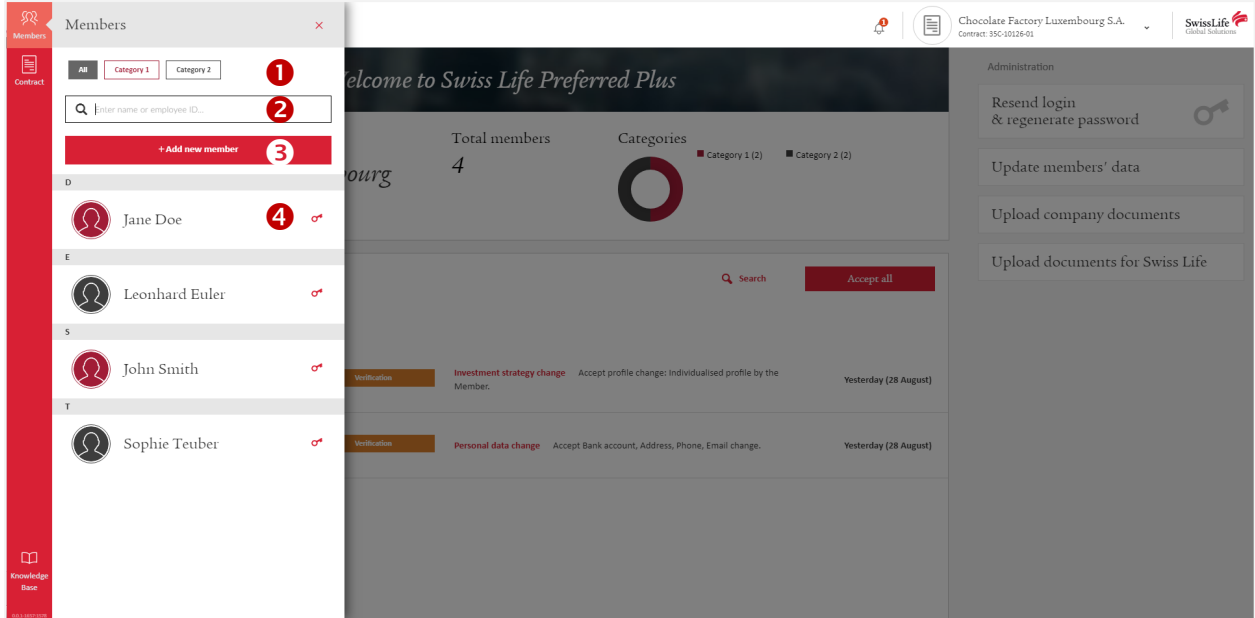
## 2. Personal settings




The screenshot shows the SwissLife Preferred Plus portal interface. At the top, there is a navigation bar with 'Home' and 'Members' tabs. The main header area displays 'Welcome to Swiss Life Preferred Plus' and 'Contract 3SC-10126-01 Chocolate Factory Luxembourg S.A.'. Below this, there are statistics for 'Total members: 4' and 'Categories' with a donut chart showing 'Category 1 (2)' and 'Category 2 (2)'. A user profile dropdown menu is open, showing options: 'Jane Doe' (1), 'Knowledge Base' (2), 'Settings' (3), and 'Sign out'. The main content area shows a list of verification tasks for 'John Smith' from 'Yesterday (28 August)', including 'Investment strategy change' and 'Personal data change'. A sidebar on the left contains 'Members' and 'Contract' icons, and a 'Knowledge Base' icon at the bottom. The right sidebar has 'Upload company documents' and 'Upload documents for Swiss Life' buttons.

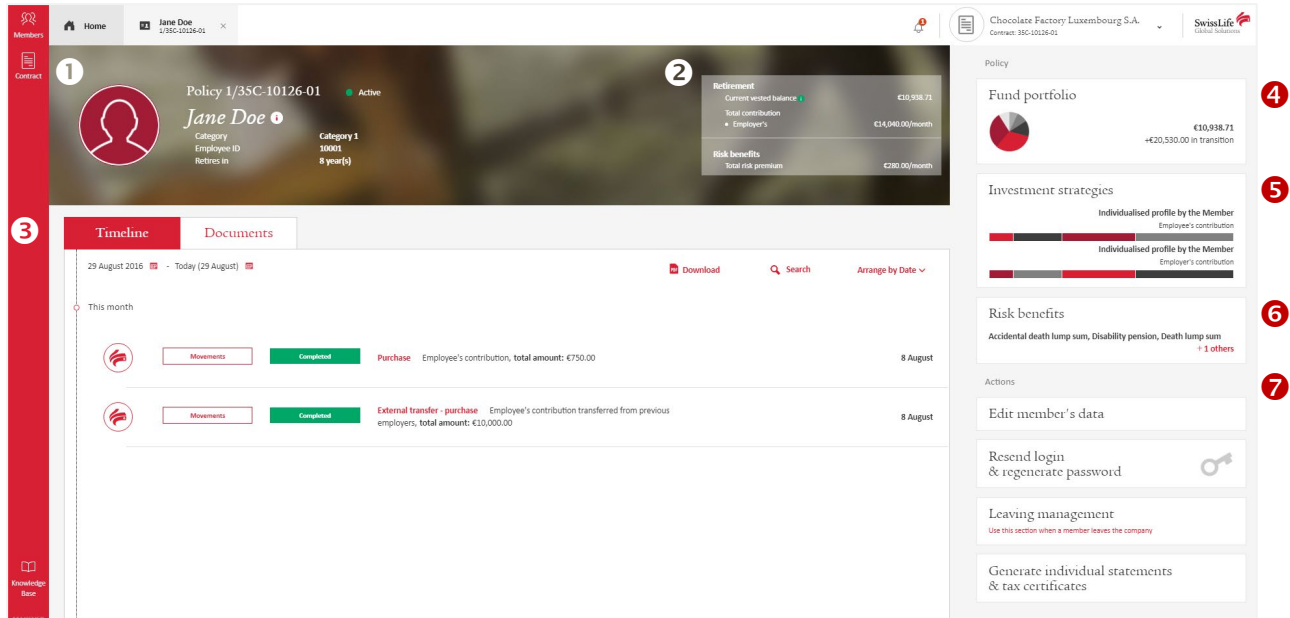
- ❶ Directly access your own policies as a member (if applicable) or another contract owned by your company
- ❷ Access guides, tutorials and helpful informations
- ❸ Customise the website to your specific daily requirements

### 3. Members search



- ❶ Sort your members by category type
- ❷ Quickly search a member filling in search criteria
- ❸ Add a new member
- ❹ List of members  
Key component  allows to directly resend a login or regenerate a password for a member

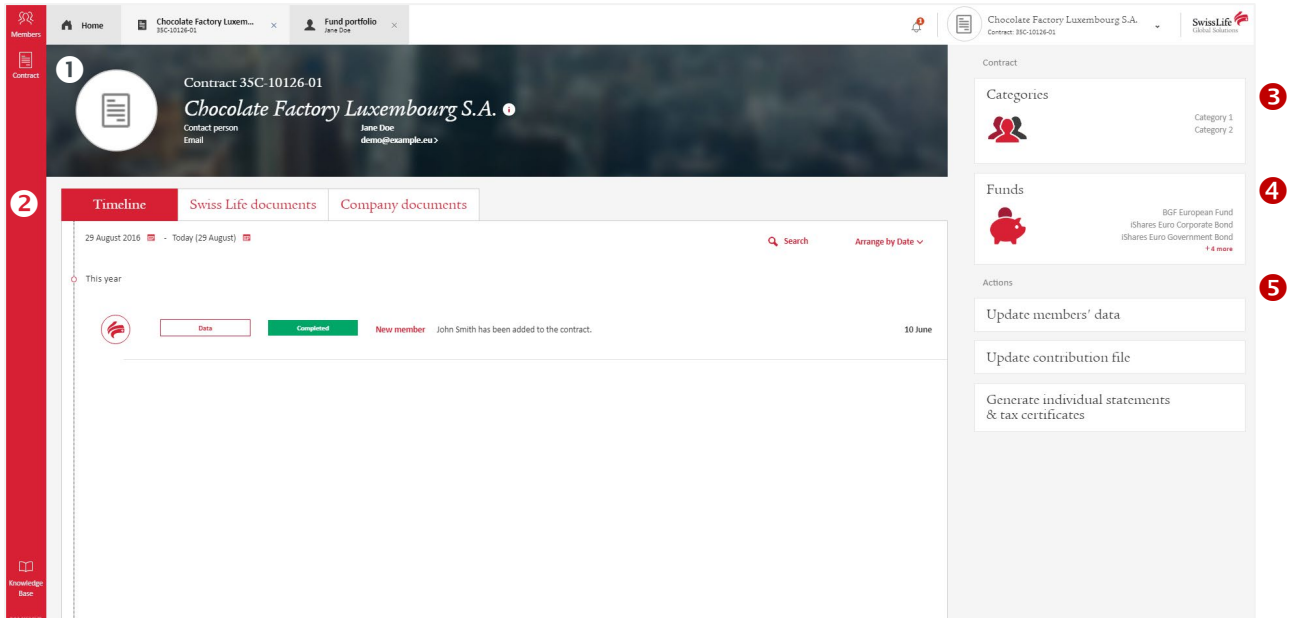
## 4. Members management



- ❶ Member's policy information at a glance
  - ⓘ icon allows to directly consult and edit member's data
- ❷ Member's benefits at a glance
  - ⓘ icon gives details about member's vested rights
- ❸
  - *Timeline* tab provides the list of operations on the policy (can be sorted by date, operation type, status...)
  - *Documents* tab provides the list of generated documents (can be sorted by date and type)
- ❹ Member's retirement portfolio including details about funds in which the accumulated savings have been invested and their distribution by contribution type
  - Switch operation can be performed here (if applicable)
- ❺ Summary of how member's retirement savings and future contributions are invested by contribution type
  - Investment strategies can be changed here (if applicable)
- ❻ Member's risk benefits in a nutshell
- ❼ Specific actions to manage your member's policy



## 5. Contract management



- ❶ Company contract information at a glance
  - ❶ icon allows to directly consult your company's data
- ❷ • *Timeline* tab provides the list of operations on the contract (can be sorted by date, operation type and status)
  - *Swiss Life Documents* tab provides the list of documents sent by Swiss Life (factsheets, contractual documents, return of products...) as well as documents sent by you to Swiss Life (can be sorted by date and type)
  - *Company Documents* tab provides the list of documents uploaded by you for the contract and shared on members' policies (can be sorted by date and type)
- ❸ List of benefits available on your company contract grouped by category of employees and type of cover
- ❹ List of funds available for investment on members' policies
- ❺ Specific actions to manage your company contract

# Member portal

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SwissLife

Overview
My retirement

Total contribution  
Employer €14,040.00/month

My retirement savings  
**€15,024.43**

Estimate at retirement with additional contributions: €352,937.94

Estimate at retirement without additional contributions: €16,905.43

Disability benefits >

Waiver of premiums  
Disability pension

Death benefits >

Death lump sum  
Accidental death lump sum

\*Disclaimer: The sums presented are only estimation and may not be accurate. The retirement savings amount is based on the current accrued savings. The estimated capital is calculated based on (i) the guaranteed rate for the Internal Funds and (ii) an estimated fixed rate of return (1%) for the open-ended investment funds (External Funds).

**2** What are you looking for?

- I want to change my beneficiaries >
- I want to update my personal details >
- I want to review my savings performance or my future contributions >
- What is my risk profile? >
- Will I have enough money when I retire? >
- I want to see my certificates >

**3** Timeline

- Certificate has been generated. 20 January
- Certificate has been generated. 9 January 2020

[Full timeline >](#)

**4** My policy details

Policy	22/93C-10261-01
Contract number	35C-10261-01
Category name	Group III - Managers, Head of Departments, Senior Professionals - Grade F
Employer name	Vodafone Panafon S.A.
Company	Swiss Life (Luxembourg) S.A
Currency	EUR

**5** My personal data

**6** My certificates

Latest individual statements

Individual statement 31 December 2020 Download

Latest tax certificates

Tax certificates 31 December 2020 Download

[Generate >](#)

**7** My documents

Latest document

SL regulations UPLOADED: 29 April 2021 Download

**8** My retirement portfolio

Total portfolio value **€50,467.31**

Funds	R&R score	Total value
Fidelity Funds - World Fund Y-Acc-EUR <small>LU0318941662 - EUR</small>		€20,095.24
PIMCO Global Investment Grade Credit Fund I H EUR Cap <small>EU0012976337 - EUR</small>		€15,254.08
BlackRock Institutional Cash Series plc InstEuroEqI'd Core Dls EUR <small>EU0005023803 - EUR</small>		€15,117.99

Total return of the policy  
(24 May 2016 - 27 May 2021)

**3.22%**

**9** Death & disability benefits

Death benefits	Sum insured
Death lump sum	€390,000.00

**10** Fund information

Funds in which you can invest.

**11** Risk Profiler

Your risk profile is **growth**

[Read more >](#)

**12** Pension Projection

Your estimated pension gap will be **€119,578.00 per year**

Additional savings needed	€3,146,739.00
Additional personal contributions needed	€314,674.00 / year

[Read more >](#)

**13** My investment strategies

**My contribution**  
Current investment strategy: Pre-defined strategy "Moderate Fund"

**Employer's contribution**  
Current investment strategy: Pre-defined strategy "Moderate Fund"

**14** My beneficiaries

The insured death benefit(s) will be attributed as follows:

- to my surviving spouse;
- in the absence thereof, to my born or unborn children of whom the line of descent is legally established, in equal shares or; through the line of succession, their children;
- in the absence thereof, to my father and/or mother;
- in the absence thereof, to my ascendants in the 2nd degree, in equal shares;
- in the absence thereof, to my brothers and/or sisters;
- in the absence thereof, to the financing fund or the employer's provident activities run jointly with the trade unions.

Beneficiaries must have a determinable identity on the day when the benefit(s) fall due. Should death be caused intentionally or upon the instigation of one of the beneficiaries, payment of the death benefit(s) is made in favour of the other beneficiaries.

https://preferredplus.swisslife.com

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- ① Quick overview of your policy(ies) including current situation of your retirement savings, estimated values at retirement as well as your risk benefits in a nutshell
- ② Change your role, your settings, your personal data or consult the Help Center here
- ③ Most frequently used options
- ④ List of operations on your policy(ies)
- ⑤ Policy(ies) information at a glance
- ⑥ Quick access to your personal data
- ⑦ Latest generated individual statements and tax certificates
  - They also can be generated here
- ⑧ Latest documents uploaded by your employer
- ⑨ Overview of your current retirement portfolio including details about funds in which the accumulated savings have been invested and their distribution by contribution type
  - Switch operation can be performed here (if applicable)
- ⑩ Overview of your risk benefits at a glance
- ⑪ List of funds available for investment on your policy(ies)
- ⑫ Answer 10 questions about your ability and willingness to bare financial risks to find out your risk profile: conservative, balanced, growth or aggressive
- ⑬ Find out what you will get on your pension based on your current savings and contributions
- ⑭ Summary of how your retirement savings and future contributions are invested by contribution type
  - Investment strategies can be changed here (if applicable)
- ⑮ Beneficiary clause of your policy(ies) (standard clause or list of beneficiaries)
  - The clause can be changed here

## Support

If you have questions or need further assistance, please contact us at [web-login@swisslife.com](mailto:web-login@swisslife.com).