

Swiss Life Preferred Plus for Members

Getting started with the new portal

09.2017



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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

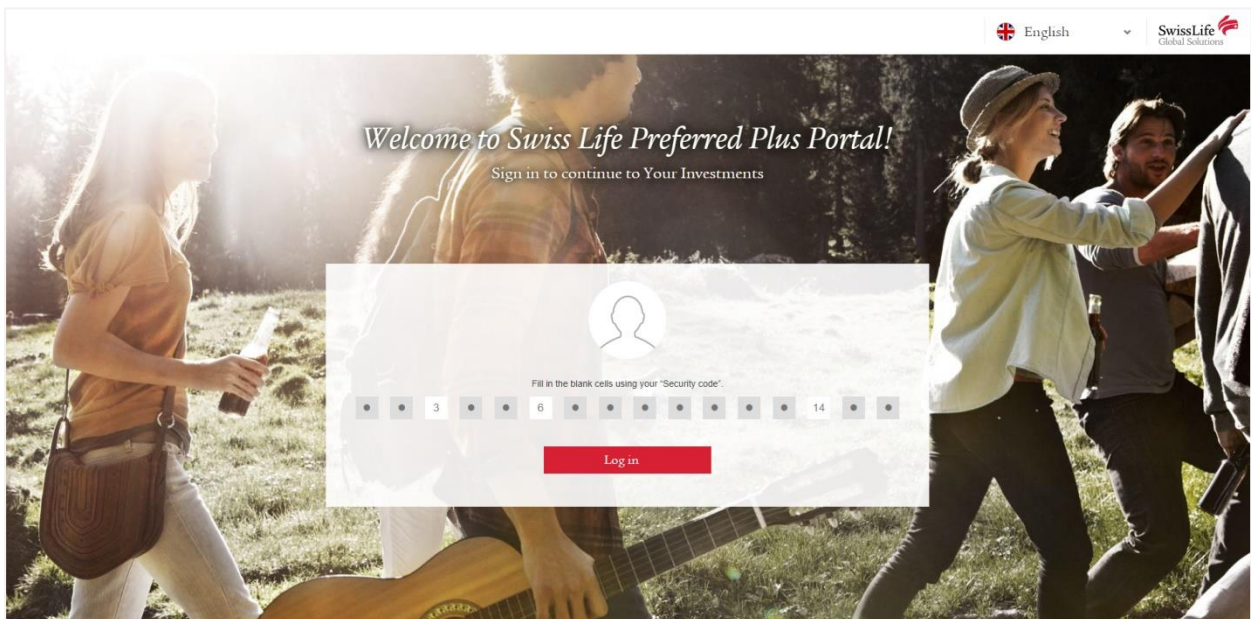


documents download

Access your portal

Connect on <https://preferredplus.swisslife.com> (minimum screen resolution is 1280x720 for an optimal browsing experience) and follow the 3-steps secured process using your current login details:

1. Enter your **User name**
2. Enter your **Password**
3. Fill in the numbered cells using your **Security code** (the numbers refer to the position of the letters in your Security code)



Example of Security code:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16

If you face login problems, please contact us at web-login@swisslife.com.

Member portal

0
1 Jane Doe

Overview

My retirement

Total contribution
Employer €14,040.00/month

My retirement savings
€15,024.43

Estimate at retirement with additional contributions: €159,237.54

Estimate at retirement without additional contributions: €18,900.43

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 Timeline

- ✔ Investment strategy changed automatically. Policy 1/35C-10126-01 27 May
- ✔ Certificate has been generated. Policy 1/35C-10126-01 27 May

[Full timeline >](#)

6 My retirement portfolio

Entire portfolio value **€15,024.43**

Funds	Total value
Swiss Guarantee EUR GUAR EUR	€15,024.43

9 My investment strategies

My contribution

Current investment strategy: Individualised profile by the Member

Employer's contribution

Current investment strategy: Individualised profile by the Member

3 My policy details

Policy	1/35C-10126-01
Contract number	35C-10126-01
Category name	Category 1
Employer name	Chocolate Factory Luxembourg S.A.
Company	Swiss Life (Luxembourg) S.A.
Currency	EUR

7 Death & disability benefits

Disability benefits	
Disability pension	€0.00
Waiver of premiums	€17,182.39
Death benefits	
Accidental death lump sum	€175,500.00
Death lump sum	€100,000.00

4 My Certificates

Latest individual statements

	Individual Statement 10 August 2017	Download
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Latest tax certificates

	Tax Certificate 10 August 2017	Download
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[Generate >](#)

8 Fund information

Funds in which you can invest.

10 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.

Economic 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 'economic' beneficiaries, payment of the death benefit(s) is made in favour of the other 'Economic' beneficiaries.

5 My Documents

Latest document

	2_Sample_Expat_Benefit_Rules__35... UPDATED	Download
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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
- ① Change your role, your settings, your personal data or consult the Help Center here
- ② List of operations on your policy(ies)
- ③ Policy(ies) information at a glance
- ④ Latest generated individual statements and tax certificates
 - They also can be generated here
- ⑤ Latest documents uploaded by your employer
- ⑥ 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)
- ⑦ Overview of your risk benefits at a glance
- ⑧ List of funds available for investment on your policy(ies)
- ⑨ Summary of how your retirement savings and future contributions are invested by contribution type
 - Investment strategies can be changed here (if applicable)
- ⑩ 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 employeebenefits@swisslife.com.