

Notice



The Vita Joint Foundation achieves an investment return of 3.7%

Zurich, March 27, 2017 – The Vita Joint Foundation achieved a return of 3.7% in 2016. Thanks to its successful investment strategy, the largest partially autonomous pension plan offers insured individuals stable interest on pension assets.

In 2016, the Vita Joint Foundation generated an annual return of 3.7% on its assets under management in an environment of continuing negative interest rates. This result lies in the middle of the key pension fund indices. All asset classes of the broadly diversified investment portfolio of the Vita Joint Foundation generated positive returns in 2016. You can find details on this in the [investment report](#) as of December 31, 2016.

Insured benefit from stable and high interest rates

Thanks to the pension planning model introduced in 2013, insured individuals at the Vita Joint Foundation will also benefit from a stable and high level of interest earned on their retirement savings capital in 2017. They will receive 2% interest on their mandatory savings and 2.5% on super-mandatory savings.

The innovative pension planning model allows the Vita Joint Foundation to build up interest reserves in strong investment years with asset returns that exceed the target coverage ratio of 106% on October 31. From these interest reserves, the Vita Joint Foundation distributes additional interest to insured parties gradually over the next five years. Over time, this secure model results in more balanced interest earned on retirement assets and makes it possible for the Vita Joint Foundation to pay interest 1% higher than the BVG minimum interest rate in 2017 too.

The largest partially autonomous joint foundation with over 20,000 companies

The Vita Joint Foundation is the largest partially autonomous joint foundation in Switzerland with around 120,000 insured individuals and over 20,000 companies. It manages pension fund assets worth CHF 11.8 billion.

Vita Joint Foundation
www.vita.ch

Media Relations
Hagenholzstrasse 60
P.O. Box, 8085 Zurich
Phone +41 (0)44 628 75 75

media@vitasammelstiftung.ch



For additional information:

Vita Joint Foundation

Media Relations

Tel. +41 44 628 75 75

media@vitasammelstiftung.ch

This notice can be accessed at www.vita.ch

The **Vita Joint Foundation** was founded by Zurich in 2004 as a partially autonomous joint foundation. It offers all companies simple, secure and clear occupational retirement provision with attractive terms. Partially autonomous means that the Vita Joint Foundation is responsible for asset investments and Zurich Life Insurance Company Ltd insures the risks. This separation offers countless benefits for customers – transparency, interest earned in line with the market, full participation in investment performance, security and flexibility. Thanks to its innovative business model, the Vita Joint Foundation has become the market leader for partially autonomous joint foundations. The Vita Joint Foundation is the largest partially autonomous joint foundation in Switzerland. Some 20,000 member companies with a total of 120,000 insured individuals have entrusted their occupational retirement provision to the Vita Joint Foundation. www.vita.ch