

## Choice of investment strategy

The **pension fund committee of the** \_\_\_\_\_ **of the** \_\_\_\_\_  
has chosen the following investment strategy as of \_\_\_\_\_ (please tick):

Investment pools	Equity share in %	Target size of value fluctuation reserves in %		Investment share (total 100%)
		Mandatory	Non-mandatory	
<input type="checkbox"/> GEMINI Pool 0	0	5,3	4,0	
<input type="checkbox"/> GEMINI Pool 25	25	10,1	8,8	
<input type="checkbox"/> GEMINI Pool 35	35	11,9	10,5	
<input type="checkbox"/> GEMINI Pool 50	50	15,5	14,1	
<input type="checkbox"/> Own investment strategy				

If a change is made to GEMINI Pool 35 or GEMINI Pool 50, the target value of the value fluctuation reserve must already be accrued at the time of the change.

Changes in strategy are possible once a year as of 1 January of the following year and once during the year as of the first of the next month. Changes during the year can be used to revert to the selected strategy (of the beginning of the year). If the first of the month is not a banking day, the change becomes effective as of the next trading day. In both cases, the strategy adjustment is a one-off change unless otherwise agreed. Should the investment strategy deviate from the selected strategy over time, the respective form must be used to re-establish the investment strategy if a return to the strategy is desired.

If you want to ensure that the strategy is reset to the initial value, a separate agreement must be concluded as a matter of principle.

GEMINI must be notified well in advance (please observe the notification deadlines for the monthly strategy change under "GEMINI Collective Foundation / Downloads" at [www.gemini.ch](http://www.gemini.ch)). If possible, investment in the new strategy will begin at the end of the month preceding the change to ensure that the performance can be calculated for the full subsequent month. GEMINI reserves the right to implement the strategy change in several steps.

By signing this form, the pension fund committee confirms that it has been notified of the reserve requirement and acknowledges that distributed positive net returns are credited to the employee benefits institution and negative returns debited. The full pension assets will be invested in the selected pool.

If the value fluctuation reserve is negative upon termination of the affiliation agreement, it must be balanced out as a matter of principle. To this end, the members' savings capital can be reduced on a pro-rata basis, or the employer can settle the shortfall. The pension assets will no longer be invested in the selected pool strategy as of the first banking day following the termination date.

The **pension fund committee of the** **of**

_____	_____
Place	Date

_____	_____	_____	_____
Signatures			

_____	_____	_____	_____
Names in block capitals			

_____	_____	_____	_____
Signatures			

_____	_____	_____	_____
Names in block capitals			

## Choice of employer contribution reserve

Employers may choose a different investment strategy for the employer contribution reserve (ECR). The respective implementation date coincides with the implementation of the investment strategy chosen by the pension fund committee. The legally valid signature of the employer is required:

- ☐ The investment strategy for the employer contribution reserve is identical with the new investment strategy.
- ☐ The employer contribution reserve will be invested in the Money Market Fund.

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Place

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Date

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Company stamp

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Employer signature /  
according to commercial register

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Name in block capitals

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Employer signature /  
according to commercial register

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Name in block capitals