

Zurich, 23 May 2022

## **Swiss Life Wealth Managers opens its first private asset management location in Zurich**

- **The Swiss Life Group is expanding its offering in Switzerland: with Swiss Life Wealth Managers, it now offers private individuals comprehensive advisory services and individual asset management from a single source.**
- **This allows private individuals to benefit directly from Swiss Life Asset Managers' over 165 years of expertise in institutional asset management and investment competence.**
- **The advisory services offered by Swiss Life Wealth Managers include asset management as well as financial planning, taxes and retirement.**
- **Swiss Life Wealth Managers is opening its first office in Zurich today and will expand its offering to other regions in Switzerland in the coming years.**

The Swiss Life Group is expanding its current offering in Switzerland and thus strengthening its position as market leader in comprehensive pension provision and financial services. The advisors of the new Swiss Life Wealth Managers business area now offer discerning private individuals tailored services in the areas of asset management, financial planning, taxes and retirement.

"We see an increasing need for comprehensive advice and tailored investment opportunities in the growing affluent market segment. Swiss Life Wealth Managers helps private individuals tailor their financial planning to their individual needs. In this way we make a decisive contribution to the self-determination of our customers," says Markus Leibundgut, Member of the Corporate Executive Board of the Swiss Life Group and CEO Switzerland.

### **Advisory and investment expertise from a single source**

Swiss Life Wealth Managers supports its customers with financial planning and asset management from a single source. The experienced advisors specialise in asset accumulation and asset diversification, always via a holistic approach. With attractive investment solutions, customers benefit directly from the over 165 years of experience and expertise in institutional asset management of Swiss Life Asset Managers, one of the largest asset managers in Switzerland. "For the first time, our investment experts are now also offering private individuals individually tailored asset management that was previously reserved for institutional investors. Besides long-term earnings targets, this service also comprises tailored risk management and



offers our customers financial confidence in all aspects," says Stefan Mächler, Chief Investment Officer of the Swiss Life Group.

### **Opening of the first location in Zurich**

Swiss Life Wealth Managers entered the market today with the opening of its first location: as of now customers will attend consultations in the premises at Tödistrasse 38 in Zurich. There will also shortly be a second location in Winterthur. Swiss Life Wealth Managers will open additional locations in the coming years and thus expand its offering to other regions in Switzerland.

### **Growth in fee business supports the "Swiss Life 2024" strategy**

With Swiss Life Wealth Managers, the Swiss Life Group is complementing its already strong range of advisory services addressing various customer needs and segments in Switzerland and thus supporting the targets of the "Swiss Life 2024" strategic programme. Swiss Life has set itself the goal of increasing assets under management for private clients in its home market to over CHF 6.5 billion by 2024. The development of the affluent segment is to make a significant contribution to this ambition and to support long-term growth in fee business.

Further information on the offering of Swiss Life Wealth Managers: [www.swisslife-wealth.ch](http://www.swisslife-wealth.ch)

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## **Swiss Life**

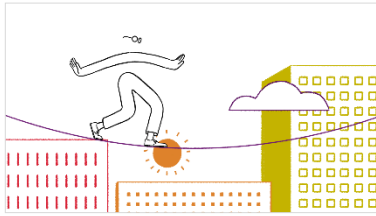
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Swiss Life Select, Tecis, Horbach, Proventus, Fincentrum and Chase de Vere advisors choose suitable products for customers from the market according to the Best Select approach. Swiss Life Asset Managers offers institutional and private investors access to investment and asset management solutions. Swiss Life provides multinational corporations with employee benefits solutions and high net worth individuals with structured life and pensions products.



Swiss Life Holding Ltd, registered in Zurich, was founded in 1857 as Schweizerische Rentenanstalt. The shares of Swiss Life Holding Ltd are listed on the SIX Swiss Exchange (SLHN). The Swiss Life Group also includes various subsidiaries. The Group employs a workforce of around 10 000 and has at its disposal a distribution network of over 17 000 advisors.

Swiss Life Wealth Managers is the designation for the wealth management activities of Swiss Life Asset Management Ltd. This publication contains advertising.



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