

Change in Investment Strategy

Retirement savings account	Account number
Client particulars	Name First name
	Insurance number
Change in Investment Strategy	I hereby instruct Liberty Foundation for 3a Retirement Savings (the "Foundation") to execute the following order: Current investment strategy <input type="checkbox"/> Account solution <input type="checkbox"/> 25Carat+ <input type="checkbox"/> 40Carat+ <input type="checkbox"/> 60Carat+ New investment strategy <input type="checkbox"/> Account solution <input type="checkbox"/> 25Carat+ <input type="checkbox"/> 40Carat+ <input type="checkbox"/> 60Carat+ Acceptance fee (3%) _____% (in favour of Asset Manager) If you wish to increase the equity content of your portfolio, a duly completed risk questionnaire is mandatory. Failing that questionnaire, the desired change in strategy cannot be made.
Foundation Regulations	I confirm that I have read and agree with the contents of the Foundation Regulations.
Governing law and jurisdiction	All legal relationships are governed by Swiss law. The place of performance is at the Foundation's principal place of business. Jurisdiction is in accordance with Article 73 BVG/LPP.
Declaration	I hereby confirm that all the indications I have provided herein are true and accurate, and I ask the Foundation to carry out the requested modification.
Signature	Place, date Client's signature