

Technical Administration module



Your benefits

Swiss Life Pension Services offers you assistance in the technical management of your employee benefits institution. We assume the administrative handling of all transactions in your pension fund's day-to-day operations. Our staff will provide the insured persons with competent and dedicated service, allowing you to concentrate fully on the strategic tasks.

Our efficiency means cost advantages for you

Swiss Life Pension Services is a significant provider of pension fund services in the Swiss market. Thanks to our benefits of scale and efficient administrative processes, we are able to provide you with top-of-the-range services on attractive terms.

Our offer

By assuming the technical administration of your pension fund, we primarily handle the following transactions:

- Affiliation of companies and enrolment of new employees
- Departures and contract terminations
- General updates
- Technical entries (single allocation, purchase of additional benefits, prepayment, pledging)
- Retirement benefits
- Disability benefits
- Death benefits
- Prepayment for home ownership
- Year-end processing and changes in salary for the following year
- Maintaining technical accounts
- Various additional services such as keeping records of changes, providing details on specific persons, maintaining pension fund statistics

Initial phase

In a first phase, the portfolio of beneficiaries is migrated to the future administration system. We offer the following services:

- Implementation of plan requirements
- Definition of pension fund documentation
- Entry of all the data on active insured persons and pensioners relevant for pension purposes
- Organising the transfer of pending changes
- Execution of the portfolio transfer
- Ensuring the availability of historical data on insured persons

Implementation phase

Technical administration services basically comprise the following:

- Maintaining the portfolio of active insured persons and pensioners
- Monitoring, processing and documenting personnel changes and data on insured persons
- Maintaining and updating employer's data
- Keeping records of data with regard to pension plan and insured persons
- Executing serial changes
- Creating questionnaires and reports
- Assessing benefit claims; calculating, entering and paying benefits
- Confirming pensions, reporting to tax authorities
- Assessing, calculating and implementing cost-of-living adjustments

Swiss Life Pension Services – a trustworthy partner

Due care and reliability are crucial in the pension fund business. We are aware that these characteristics are founded on trust. This is why we strive for a long-term and committed partnership. Thanks to our wide-ranging experience, in-depth knowledge and the high technological standards of our data processing and administration systems, we are able to meet your requirements with all the reliability and efficiency you need.

Advantages for you

- We guarantee lean procedures and efficient processing.
- We have a skilled and committed administration team that is capable of handling even the most complex of business cases swiftly and competently .
- We use a state-of-the-art, internet-enabled administration platform and process the insured persons' data on a constantly updated system.
- We draw on our wide-ranging experience and expertise in the handling of your transactions.
- We use simple and jargon-free wording in our correspondence with clients and the pension certificates.
- We emphasise a good culture of cooperation, which forms the basis of outstanding results.
- If necessary, we refer you to Swiss Life Group specialists from the legal, actuarial, medical (including prevention) and IT fields and coordinate cooperation.
- You have an advanced internet solution at your disposal with around-the-clock online access to all your data.

Swiss Life Pensions Services is a strong partner at your side – ensuring top-quality administration of your pension fund at all times.

Swiss Life Pension Services – a strong outsourcing partner