

Operational Management module



Your benefits

Swiss Life Pension Services offers you assistance in managing your employee benefits institution. Thanks to many years of experience and our wide-ranging expertise, we can handle all the management tasks involved in a professional and reliable manner. Thus the Board of Trustees always has a competent basis for its decisions, and you are left with more time to concentrate on strategic tasks.

Benefiting from our experience

The management of a pension fund is regularly confronted with complex issues which can have a strong impact on the institution's development. Swiss Life Pension Services will help you take the appropriate decisions. As part of the Swiss Life Group, we look back on a 150-year history in the field of occupational pensions. You stand to gain from our experience both in the systematic analysis of business processes and the methodical implementation of improvements. Together we will find the ideal solution for your specific requirements.

Our offer

Swiss Life Pension Services staff will take over the operational management as well as the organisation and administration of your employee benefits institution. Our offer includes the following services:

Operational management

- We develop, implement and monitor a reliable system of procedures.
- We regularly supply you with up-to-date key management figures
- We develop an internal control system.
- We organise the Board of Trustees meetings (planning, preparation, execution, follow-up).
- We manage projects and ensure the implementation of strategic guidelines issued by the Board of Trustees.
- We coordinate communication with external parties (e.g. supervisory authorities, auditors, pension fund actuaries) and prepare all the requisite information material.
- We regularly provide information to the insured persons, pensioners and affiliated companies.
- We create foundation documents such as charters, organisational regulations and investment regulations.
- We organise elections to choose a new Board of Trustees or to replace trustees.
- We ensure that trustees undergo regular basic and advanced training.
- We represent the foundation on internal and external panels of experts.

Temporary operational management

If there is a management vacancy, for example because no successor has been appointed or the person responsible is temporarily unable to fulfil his or her function, we are prepared to assume all the management tasks. In doing so, we follow the rules and guidelines issued by the Board of Trustees and guarantee impeccable management and a clear and structured transfer of business when the mandate comes to an end.

Targeted management support

There are crucial moments and situations in the course of an employee benefit institution's development (foundation, process optimisation, partial liquidation, liquidation) in which the institution's management is well advised to call in outside support. In such cases we offer you our capacities and expertise in a targeted fashion for as long as necessary until the required result has been achieved. We also put an emphasis on close coordination and open communication.

Swiss Life Pension Services – a trustworthy partner

We are fully aware that outsourcing the management of your pension fund represents an act of trust. This is why we strive for a long-term and committed partnership. Thanks to our wide-ranging experience, expertise 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 rightly expect.

Advantages for you

- You can reduce your administrative workload through custom-tailored outsourcing. The time you gain allows you to focus more consistently on your strategic tasks.
- We support your pension fund's development process as a reliable partner. Our methodological and analytical experience will help steer the pension fund's development in a positive direction.
- We emphasise a good culture of cooperation, which forms the basis of outstanding results.
- We communicate regularly in a transparent manner and supply your management with the latest key figures on an ongoing basis.
- We ensure that you are personally acquainted with the specialists in all areas involved who will be playing a key role in the management of your pension fund.
- We will be fully responsible for coordinating and communicating with other outsourcing partners in the implementation of Board of Trustees' decisions.

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

Swiss Life Pension Services: a strong outsourcing partner