

Revo

Invest Like the Pros

With Revo you invest in shares of promising companies.
Now also available as part of an insurance policy with YOUPLUS.



The revolutionary investment solution **ZUGERBERG** FINANZ

About Zugerberg Finanz

Zugerberg Finanz has been supporting private and institutional investors of all sizes with their investments for more than 20 years. In doing so, we rely on active, independent asset management with a domestic focus.

Want to learn more about Revo?

You can find further information on this promising investment offer at www.zugerberg-finanz.ch/revo

BILANZ

Best Asset Manager in Switzerland
2022, 2021 (3rd place)
2020, 2019, 2018 (1st place)

CITYWIRE

Top Swiss Franc Bond Manager
2018, 2017

MORNINGSTAR®

5 stars for 10 years 2012–2022

Your needs

Asset management

Do you have limited time to actively look after your savings and want a reliable and independent asset manager?

No conflicts of interest

Do you want someone to look after your assets who also invests their money exactly the same way, without any conflicts of interest?

Equity

Do you prefer direct investments in promising companies whenever possible?

Foreign currencies

Do you prefer to invest the majority of your assets in Swiss francs?

Private equity

Do you want to participate in the returns of this exciting asset class and get the benefits of diversification?

Current income

Would you like to achieve current income through investments in dividend-bearing equities and attractive bonds and benefit from tax relief on this income under an insurance policy?

What is Revo?

Revo is the revolutionary investment concept from Zugerberg Finanz. Revo offers you the chance to invest directly in promising companies from a monthly savings contribution of CHF 100. The shares are selected by Zugerberg Finanz and managed under your insurance policy.

Why Revo?

Well substantiated

Experience, science, and clear values – we make investments based on the macroeconomic assessments of our experienced CIO Office and Advisory Board.

Hand - picked

Our carefully selected equities portfolios include promising Swiss companies, but also renowned international stocks. In addition, fixed-income funds grant you access to promising, mostly institutional bonds.

Active

For the duration of the contract, we will constantly keep an eye on your investment – and actively intervene when the markets change.

Credible

We believe in your investment which is why we invest our own assets in the same way in which we also invest our clients' assets.

Transparent

You can track your current positions and performance under your insurance policy with YOUPLUS.

How does Revo work?

1. Choose your personal investment strategy based on your risk profile from 5 risk classes with flexible equity or bond shares.
2. Choose the amount of your savings or investment installment.

Equity share with the risk classes 1 to 5:



3. Sit back and watch your assets build up; we'll keep an eye on your investment and actively intervene when the market situation demands it.

Revo asset management for savings

Flexible and individual investment

Zugerberg Finanz Revo gives investors the opportunity to benefit from professional, active asset management from a regular investment of CHF 100 per month. Implementation mainly takes place by means of individual titles, except in the area of bonds (transparent collective investment instruments).

Investment strategies

- Zugerberg Finanz Revo1
Risk class 1 with max. 20% equity share
- Zugerberg Finanz Revo2
Risk class 2 with max. 40% equity share
- Zugerberg Finanz Revo3
Risk class 3 with max. 60% equity share
- Zugerberg Finanz Revo4
Risk class 4 with max. 80% equity share
- Zugerberg Finanz Revo5
Risk class 5 with max. 100% equity share
- Zugerberg Finanz RevoDividends
Risk class 5 with max. 100% equity share

Investment character

Active asset management services, broad range model according to the selected investment strategy

Form of investment

Savings plan
flexible and customised

Investment amount

From CHF 100 per month as part of your insurance policy with YOUPLUS

Your advantages:

- higher return opportunities through investment in securities
- regular investment cycle
- flexible and variable deposits possible
- transparent investment
- tax-privileged as part of your insurance policy with YOUPLUS

Revo Savings Plan

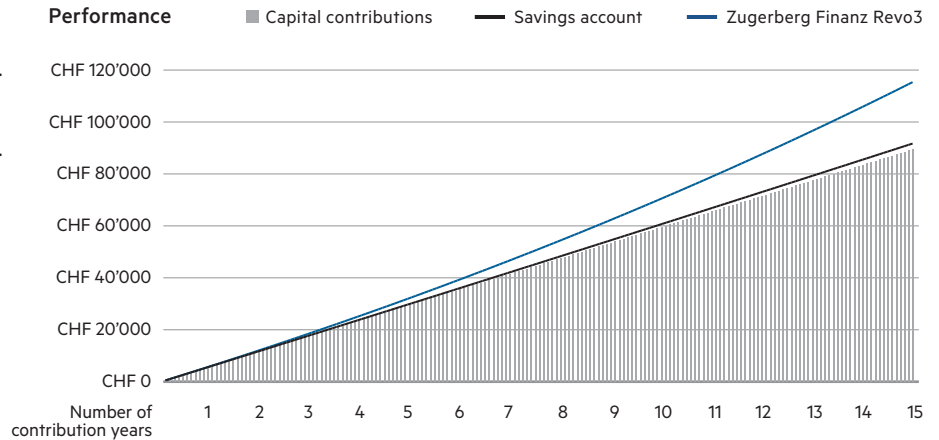
Achieve your savings goals

Monthly deposit CHF 500

Savings account assumed interest rate (as at 01.01.2023) 0.25% p. a.

Expected return¹ Zugerberg Finanz Revo3 3.25% p. a.

Investment period in months Zugerberg Finanz Revo3 180



■ Total paid-in capital	CHF 90'000
— Final amount after 180 months with the savings account	CHF 91'716
— Final amount after 180 months with the Zugerberg Finanz Revo3 investment strategy ²	CHF 115'652

¹Net, after deduction of all Zugerberg Finanz's running costs; the costs of the insurance policy are not included in this presentation.

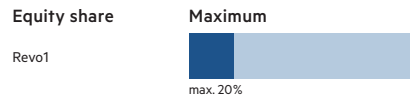
²The hypothetical performance shown in these investment calculations is based on long-term, average empirical values from the past. Significant deviations the reform might occur in the short term which is why performance will never be linear. The achievement of forecast values is in no way guaranteed. Investment calculations do not constitute a request to submit any offers, nor do they constitute an offer or a recommendation to purchase or sell any financial instruments.

Investment strategies comparison

Zugerberg Finanz Revo

Zugerberg Finanz Revo1

Investor profile: Suitable for investors with a strong need for security, who want to invest their assets in a value-preserving manner.



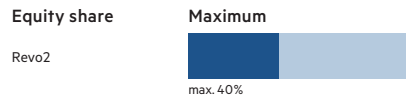
Expected return³: 1.75% p. a.

Investment horizon: At least 5 years

³Net, after deduction of all Zugerberg Finanz's running costs; the costs of the insurance policy are not included in these expected returns.

Zugerberg Finanz Revo2

Investor profile: Suitable for balanced investors who want to invest their assets in a value-increasing manner.

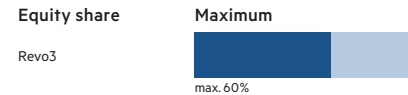


Expected return³: 2.50% p. a.

Investment horizon: At least 7 years

Zugerberg Finanz Revo3

Investor profile: Suitable for investors with an increased risk appetite who want to invest their assets in a value-increasing manner.



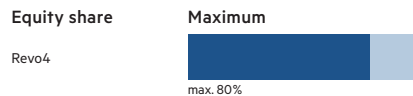
Expected return³: 3.25% p. a.

Investment horizon: At least 10 years

Detailed information about the asset classes can be found in the allocations and the investor information.

Zugerberg Finanz Revo4

Investor profile: Suitable for investors with a low need for security who want to invest existing assets in a profitable manner.



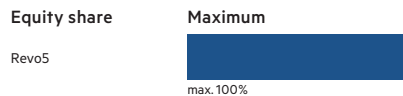
Expected return³: 4.00% p. a.

Investment horizon: At least 10 years

³ Net, after deduction of all Zugerberg Finanz's running costs; the costs of the insurance policy are not included in these expected returns.

Zugerberg Finanz Revo5

Investor profile: Suitable for investors with a low need for security who want to invest existing assets in a profitable manner.

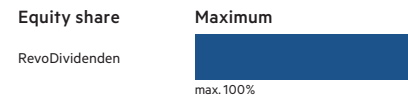


Expected return³: 4.75% p. a.

Investment horizon: At least 10 years

Zugerberg Finanz RevoDividends

Investor profile: Suitable for investors with a low need for security who want to invest existing assets in a profitable manner.



Expected return³: 4.75% p. a.

Investment horizon: At least 10 years

Revo Price list

Asset management company	Zugerberg Finanz
Reference currency	CHF
Minimum recurring deposit	from CHF 100 per month as part of your insurance policy with YOUPLUS
Investment character	Active asset management, ranges model according to the chosen investment strategy
Investment instruments	Mainly individual titles
Custodian bank	Zuger Kantonalbank
Asset management fee	0.25% p.a plus VAT

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