

ZugerKB e-fund savings plan (switch/change of fund selection)

This form applies solely to the ZugerKB e-fund savings plan.

Client data

First name, last name *

Address *

Postcode, town *

Client no.

Fund savings plan custody
account no. *

* Required fields

- Switch entire existing portfolio to a different investment fund (partial switches are not possible)

and/or

- change fund selection (applies to future investments)

Fund name

Sec. no.

Please select only **one** fund.

Strategy funds

- | | |
|--|----------|
| <input type="checkbox"/> ZugerKB Fonds – Strategie Konservativ (CHF) | 27610084 |
| <input type="checkbox"/> ZugerKB Fonds – Strategie Ausgewogen (CHF) | 27610110 |
| <input type="checkbox"/> ZugerKB Fonds – Strategie Dynamisch (CHF) | 43900019 |
| <input type="checkbox"/> Swisscanto (LU) PF Responsible Select (CHF) | 1544231 |
| <input type="checkbox"/> Swisscanto (LU) PF Responsible Balance (CHF) | 1544234 |
| <input type="checkbox"/> Swisscanto (LU) PF Responsible Ambition (CHF) | 1092984 |

Equity funds

- | | |
|--|----------|
| <input type="checkbox"/> ZugerKB Fonds – Aktien Schweiz (CHF) | 43583062 |
| <input type="checkbox"/> ZugerKB Fonds – Aktien Europa (EUR) | 43583064 |
| <input type="checkbox"/> ZugerKB Fonds – Aktien USA (USD) | 43583068 |
| <input type="checkbox"/> iShares Core SPI® ETF (CH) (CHF) | 23793565 |
| <input type="checkbox"/> iShares Core MSCI Europe UCITS ETF EUR (Acc) (EUR) | 10608355 |
| <input type="checkbox"/> Vanguard S&P 500 UCITS ETF (USD) | 18575508 |
| <input type="checkbox"/> iShares Core MSCI Emerging Markets IMI UCITS ETF (USD) | 24209517 |
| <input type="checkbox"/> UBS ETF – MSCI World Socially Responsible UCITS ETF (USD) A-dis | 13042150 |

Swiss real estate

- | | |
|---|---------|
| <input type="checkbox"/> UBS (CH) Prop. Fund – Swiss Mixed Sima (CHF) | 1442087 |
|---|---------|

I have read and understood the factsheet for the chosen fund as well as the Key Information Document (KID) available at www.zugerkb.ch/e-fund-savings-plan.

Place, date

Signature of client

Place, date

Signature of Zuger Kantonalbank

Please upload this document in E-Banking under "Messages", with "Investment and pension products" in the subject line, then send it to us. Alternatively, please sign and return by post to Zuger Kantonalbank, P.O. Box, 6301 Zug.