

FINANCIAL INVESTMENT WITH CAPITAL PROTECTION

INVESTA SAFE: A CLEVER COMBINATION OF INSURANCE AND INVESTMENT

With our INVESTA Safe life insurance, you make an initial one-time deposit of at least CHF 10,000. This will allow you to benefit from integrated capital protection, potential returns and a guaranteed lump sum death benefit.

WHY IS THIS LIFE INSURANCE WORTH IT?



CAPITAL PROTECTION

The issuer guarantees capital protection of 109.8% on maturity, irrespective of the performance of the benchmark index.



POTENTIAL RETURNS

On maturity, you benefit from potential price gains on your invested capital based on the index used ("SXI Switzerland Sustainability 25 Index CHF 3.5% Decrement"). This includes 25 Swiss companies with Inrate's highest ESG impact ratings.



LUMP SUM DEATH BENEFIT

Integrated cover in the event of death gives your surviving dependents financial security should something happen to you. For example, you can name your family or your business partner as your beneficiary – it's entirely up to you.

The free choice of beneficiaries means that the lump sum death benefit is paid out directly and not included in your estate.

YOUR BENEFITS

- ✓ Attractive capital protection with potential returns
- ✓ Assumption of stamp tax by Generali
- ✓ Tax advantages if the contract is concluded before the policyholder's 66th birthday
- ✓ Privileged inheritance and bankruptcy rules
- ✓ Guaranteed death benefit from day one of the cover
- ✓ No health questions up to CHF 300,000

REAL-LIFE EXAMPLE

YOUR PAYMENT	GUARANTEED DEATH BENEFIT	CAPITAL PROTECTION GRANTED	ISSUER
CHF 100,000	CHF 107,701	CHF 109,800	Deutsche Bank AG

DATA, FACTS AND FIGURES

Limited supply: priority will be based on receipt of application and single premium.

Financing	Single premium of at least CHF 10,000
Contract term	10 years
Age at entry	50–70 years
Loan and surrender	Both possible at any time
Beneficiary rule	free choice of beneficiaries

SUBSCRIPTION PERIOD	STARTING DATE OF INSURANCE
15 March until 31 May 2024	1 June 2024

CONTACT

Do you have any questions or would you like a non-binding quote? Contact your personal advisor or our customer service on 0800 881 882. We will be happy to help you.

You can find out more on our website: [generali.ch/capital-protection-product](https://www.generali.ch/capital-protection-product)

Legal notice and issuer risk

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