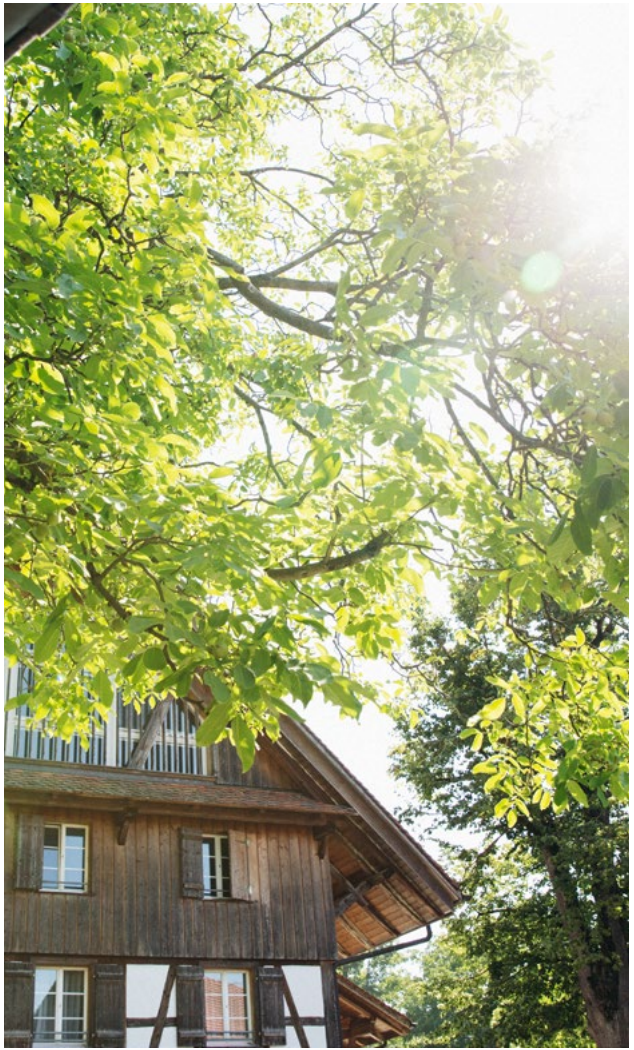
ZUGERBERG FINANZ

Invitation

Financial and Pension Planning

Information event for private Swiss residents
Wednesday, 22 October 2025



Financial and Pension Planning

How transparent are your pension assets? Where is your pension invested? Is your Swiss pension 2 and 3a portable? What amount of CHF pension is enough for me? Who is working for me – an asset manager or a bank manager? Know your options and compare them in the Swiss financial industry when making decisions.

Our experts will dive into Zugerberg Finanz trusted values and demonstrate:

- **Zugerberg Finanz Investment Philosophy**
- **Financial and Pension Planning – now and tomorrow**
- **Financial Markets and Economic Outlook 2025**

Investing money is not just a question of know-how. Today, more than ever, it is also a matter of trust. Investors seek approachable, trustworthy, honest and transparent financial partners – these are base values of Zugerberg Finanz. We advice private and institutional investors on their investments. Our motto has always been and always will be: we only buy for our clients what we buy for ourselves.

Programme:

18:00 pm	Welcome drink
18:30 pm	Presentation followed by a Light Apéro
21:30 pm	End of the event

Speakers:

- **Roman Leu**
  Head of Private Clients
- **Prof. Dr. Maurice Pedergnana**
  Chief Economist and Managing Partner
- **Tania Mobayed**
  Brand Ambassador
- **Roger Baumgartner**
  Pension Specialist

Date / Time:	Wednesday, 22 October 2025 / 18:00 pm
Place:	At the Lüssihof, Lüssiweg 47, 6300 Zug
Registration:	Online at zugerberg-finanz.ch/event via QR-Code
RSVP:	Latest by October 16, 2025, registration online, limited seating

Online registration

This is an information event for the English-speaking community. It is an opportunity to hear about current topics in investing and appropriate solutions for Swiss domiciled individuals. Zugerberg Finanz is a 25-year-old asset manager, managing over 5 billion CHF portfolios for: private persons, BVG vested pension II holders (portable pension), corporate institutions and family offices, offering affordable entry levels and with active management.