3a Revo

The best stocks for your pension assets

With 3a Revo you invest in shares of promising companies.

What is 3a Revo?

3a Revo is the name of the revolutionary investment concept from Zugerberg Finanz. 3a Revo offers you the chance to invest directly in promising companies with just a one-off amount starting from CHF 5'000 or an individual monthly savings plan from CHF 100. This offer is made possible by 3a Revo investing in fractions of shares. These are selected and managed by Zugerberg Finanz and bought directly into your portfolio.

Why 3a Revo?

Tax advantage: When choosing 3a Revo, you save taxes in several ways.

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 compiled portfolios include promising Swiss companies, as well as notable international investments. We invest in individual titles wherever possible and appropriate and supplement these with ETFs and investment funds, especially abroad and in the case of bonds.

Active: During the term of the contract, we will always keep an eye on your vested pension benefits – and actively intervene in the case where the market situation changes.

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 view your current positions, performance, all transactions, dividends, fees, and much more on the app on a daily basis.

How does 3a Revo work?

1. Choose your personal investment strategy based on your risk profile from 5 risk classes with flexible equity or bond shares.

2. Transfer your existing 3a vested pension benefits or transfer your regular 3a savings instalment.

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.

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 and trust in our own expertise.

Want to learn more about 3a Revo?

You can find further information on this promising investment offer at www.zugerberg-finanz.ch/3a-revo-en

BILANZ

Best Asset Manager in Switzerland
2023, 2020, 2019, 2018 (1st place)
2024, 2022, 2021 (3rd place)
2025 (1st place – dynamic; Sharpe ratio)

MORNINGSTAR

5 stars for 10 years 2016–2025

ZWEI WEALTH

Rating "highly recommended"
August 2023

CITYWIRE

Top 50 Asset Manager
2025, 2024, 2023, 2022, 2021, 2020, 2019

ZUGERBERG FINANZ

Zugerberg Finanz AG
Lüssiweg 47
CH-6302 Zug

+41 41 769 50 10
info@zugerberg-finanz.ch
www.zugerberg-finanz.ch

Advertising. Only for clients resident in Switzerland.

All statements published here are for information purposes only and do not constitute investment advice or other recommendations. We cannot guarantee the correctness and / or completeness of this information. This publication is aimed exclusively at clients / prospects from Switzerland and the legal information in the legal notice on www.zugerberg-finanz.ch applies accordingly. All statements regarding performance are indicative in nature, refer to the past and are no guarantee of future developments.

Imprint: Zugerberg Finanz AG, Lüssiweg 47, 6302 Zug, Switzerland, +41 41 769 50 10, info@zugerberg-finanz.ch, www.zugerberg-finanz.ch.