Säule 3a mit ETF SOLL Allokation

							Bestehende Kd.		Neukunden	
Anlageklasse	**Titel**	**ISIN**	**AP2**	**AP3**	**AP4**	**AP5**	**AP6**	**AP7**	**AP6**	**AP7**
Aktien Schweiz	UBS (CH) Investment Fund - Equities Switzerland Passive Leader W	CH0389550945	4.0%	7.0%	8.0%	11.0%	14.0%	20.0%	17.5%	24.3%
Aktien Schweiz	iShares Swiss Dividend ETF (CH)	CH0237935637	2.0%	3.0%	5.0%	6.0%	8.0%	10.0%	10.0%	12.1%
Aktien Schweiz	Swisscanto (CH) Index Equity Fund Small & Mid Caps Switzerland GT	CH0330968451	2.0%	3.0%	5.0%	6.0%	8.0%	10.0%	10.0%	12.1%
Aktien Schweiz			**8.0%**	**13.0%**	**18.0%**	**23.0%**	**30.0%**	**40.0%**	**37.5%**	**48.5%**
Aktien Welt	CSIF World ex CH Index Blue (abgesichert in CHF) - QBH	CH0045357933	4.0%	6.0%	9.0%	11.0%	15.0%	20.0%	18.8%	24.3%
Aktien Welt	CSIF Equity World ex CH ESG Blue	CH0424136817	3.0%	6.0%	5.9%	8.3%	11.4%	15.2%	14.2%	18.4%
Aktien Schwellenländer	CSIF Equity Emerging Markets ESG Blue	LU2300204265			2.1%	2.7%	3.6%	4.8%	4.5%	5.8%
Aktien Ausland			**7.0%**	**12.0%**	**17.0%**	**22.0%**	**30.0%**	**40.0%**	**37.5%**	**48.5%**
Aktien			**15.0%**	**25.0%**	**35.0%**	**45.0%**	**60.0%**	**80.0%**	**75.0%**	**97.0%**
SBI AAA-BBB	Syz AM (CH) Track - CHF Bonds - D2	CH0182982774	10.4%	9.1%	7.7%	6.4%	4.4%	3.5%	5.3%	
SBI AAA-BBB	CSIF (CH) Bond Switzerland AAA-BBB Blue QB	CH0482006191	10.4%	9.1%	7.7%	6.4%	4.4%			
SBI AAA-BBB 1-5	Swisscanto (CH) Index Bond Fund Total Market AAA-BBB 1-5 CHF - G	CH0330999142	10.4%	9.1%	7.7%	6.4%	4.4%	1.7%	2.7%	
Zinswerte Schweiz			**31.2%**	**27.2%**	**23.2%**	**19.2%**	**13.2%**	**5.2%**	**8.0%**	**0.0%**
Global Agg ESG	CSIF Bond Aggregate Global ex CHF ESG Blue CHF Hedged	CH0424139357	15.6%	13.6%	11.6%	9.6%	6.6%	5.2%	4.0%	
Global Agg	Vanguard Global Bd Idx Ins Plus CHF Hdg	IE00BGCZ0C60	15.6%	13.6%	11.6%	9.6%	6.6%		4.0%	
Global Agg 1-5	CSIF Bond Aggregate Global ex CHF 1-5 Blue CHF Hedged	CH0214985100	15.6%	13.6%	11.6%	9.6%	6.6%	2.6%	4.0%	
Zinswerte Ausland			**46.8%**	**40.8%**	**34.8%**	**28.8%**	**19.8%**	**7.8%**	**12.0%**	**0.0%**
Zinswerte			**78.0%**	**68.0%**	**58.0%**	**48.0%**	**33.0%**	**13.0%**	**20.0%**	**0.0%**
Immobilien Schweiz	UBS ETF (CH) - SXI Real Estate Funds (CHF) A-dis	CH0105994401	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	3.0%	
Immobilien			**5.0%**	**5.0%**	**5.0%**	**5.0%**	**5.0%**	**5.0%**	**3.0%**	**0.0%**
Liquidität			2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	3.0%
Liquidität			**2.0%**	**2.0%**	**2.0%**	**2.0%**	**2.0%**	**2.0%**	**2.0%**	**3.0%**