

## About Helvetia Swiss Life Insurance Company Ltd

Helvetia is an insurance solutions provider, based in Switzerland. The company's product portfolio includes life insurance, accident insurance, health insurance, property insurance and automobile insurance. It provides services, such as retirement solutions, asset management services, investment advices, broking services, and banking services. Helvetia is headquartered in Basel, Switzerland.

Through our smart finance and insurance solutions, we offer a complete service package. Dependable support, reliable cooperation, and trust-based relationships are key aspects of our stakeholder interaction.

Helvetia, a European company founded in 1858, currently employs 22,000 people at its headquarters in Basel (Switzerland) and across its subsidiaries in Belgium, Germany, Luxembourg, Spain, Italy, Austria and France."

"In Switzerland, Helvetia works together with Baloise Bank Ltd as a specialised financial services provider. The combination of an insurance company and bank, which is unique in Switzerland, provides customers with all-round consultation and solutions

tailored to their needs.

The Asset Management of Helvetia accommodates the growing demand of the Group and of third-party customers for high-quality financial products and qualified portfolio management, while strengthening the positioning of Helvetia as a leading financial services provider in Switzerland.

On 8 December 2025, Baloise and Helvetia merged to form a single group named Helvetia. The merger took place on an equality basis between the two companies.

The direction of our strategy is aimed at further strengthening the long-term reliability that we offer to our customers, shareholders, sales partners and employees in order to create lasting value for all our stakeholders.

As an employer, Helvetia cultivates an employee-oriented corporate culture. We offer our employees the freedom to make their own contribution to the success of the company and to develop both personally and professionally.

robust business model that has ensured reliable profitability, even during the recent capital market crises.

**STRONG CAPITALISATION** - Thanks to the high reliability of our business model, our balance sheet and capitalization are rock solid. This has also been the basis of our reliable and attractive dividend policy for more than a decade."

## Local strengths USPs

**TARGET CUSTOMER MANAGEMENT** - Our target customer management sets new benchmarks for our industry. The systematic focus on risk-aware key customers is deeply embedded in our culture, in terms of guiding behavior, processes and remuneration schemes, and provides us with one of the most profitable insurance portfolios in Europe.

**HIGH CASH FLOW GENERATION** - By consistently implementing our strategy, we have created a

### Facts & figures

- Insurope member since: 1966
- Financial Rating: A+ by Standard & Poor's

### Average Turnaround Times

- General Questions: 3 Days
- Local Quote: 10 Working Days
- Annual Renewal: 15 Working Days
- Rate Review: 5 to 10 Working Days
- Death Claims : 15 Working Days
- Disability Claims: 15 Working Days
- Medical Claims: Not applicable

### Benefits

- Insurable Benefits: ADLP
- Poolable Benefits: DLP

### Minimum lives criteria

- For a group quote: No minimum required
- For pooling contract: No minimum required

### Local contact information

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