



## That's why we are your team in all legal matters concerning occupational benefits

#### Comprehensive and tailored package

If tailored solutions of the highest quality are your top priority, then we are the right legal partner for you. Our team can provide you with comprehensive legal advice on all issues concerning occupational benefits even in the most complex of cases – in German, French and English.



We combine legal expertise with industry knowledge. Our specialised lawyers and attorneys, with many years of experience in providing legal advice and representation, are well-versed in technical legal matters, but are equally familiar with the practical and economic demands of providing pension solutions.





#### 360°Benefits

We are the team to contact for all legal topics concerning occupational benefits and related legal areas such as social security and labour law. Working closely with other Willis Towers Watson specialists, we provide you comprehensive and interdisciplinary support via a single point of contact.



In addition to legal advice and representation before authorities and in court proceedings, we create real added value for you, that goes beyond these services.



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## Your legal advice

Willis Towers Watson offers you 360°Benefits. Our Legal Team has the right answer for all legal questions regarding occupational benefits. We advise your pension fund or your company according to your individual needs and are available to you as competent contacts with our expertise.

#### **Pension Funds**

The legal challenges you face are complex. We are your partner, with a thorough command of the ever-changing legal framework, as well as having day-to-day working knowledge in the field of occupational benefits

In particular we support you in:

- Drafting, amending and modernising the trust deed as well as all fund rules and contracts
- Legal aspects relating to structural changes such as partial liquidation, merger and liquidation
- Analysis of legal issues and preparation of legal opinions
- Advice, negotiations and representation in legal proceedings before supervisory authorities and courts
- Legal handling of complex benefit cases and insured persons' enquiries
- Implementation of new regulatory requirements

#### **Companies**

For your company, we create occupational benefits solutions that fit your needs, whether it is for your own pension scheme, a 1e plan or a collective foundation.

In particular we support you in:

- Development and introduction of optimal pension solutions for specific sub-groups of employees
- Legal advice and coordination with the pension fund in the development and implementation of social plans and changes to plan design
- Legal due diligence, contract review and editing for M&A transactions
- Advice on employee participation, consultation and information provision
- Legal advice to the human resources department on all issues relating to occupational benefits, labour and social security laws

#### More than legal advice

We also advise you on governance and communications topics, provide training and keep you up to date with our publications and information on legal developments in legislation and court practice.

# Tailored solutions for every eventuality

Winding-up a pension fund

Communication

Amending fund rules to legal developments

#### **DSM Nutritional Products Ltd.**

#### Challenge

A top-up pension plan was no longer granted tax exemption following a change in tax practice. In the new pension solution, the quality of the core elements and special features of the previous solution had to be maintained. Creative approaches, skilled communication with various parties and close interdisciplinary cooperation were necessary.

#### **Our services**

- Legal advice and development of various legal solutions
- Advice on the establishment of a new top-up plan, the liquidation of the previous top-up plan and the transfer of assets
- Drawing up of rules and contracts

#### **Elite Pension Fund**

#### Challenge

Following a change in the law, this collective foundation had to offer its 1e solutions within the framework of a proprietary foundation. Most importantly: Quickly coordinate and implement a practicable solution with many different stakeholders.

#### **Our services**

- Planning, project management and coordination for the establishment of the new 1e foundation
- Splitting of the previous foundation and transfer of pension assets and members
- Preparation of the new foundation deed, rules and affiliation agreements
- Coordination with commercial register, supervisory and tax authorities

Establishment of a new foundation

Governance and Monitoring

Partial liquidation of a foundation

Complex benefits cases

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### Simply convincing

The experience and competence of the Willis Towers Watson legal team enabled a successful implementation of this complex restructuring project. Elite Foundation 1e and Elite Pension Fund were able to benefit from Willis Towers Watson's expertise in managing the project, drafting the rules, coordinating with the experts involved and negotiating with the relevant authorities.

Aldo Bussien Chairman of Elite Pension Fund and Elite Foundation 1e Lausanne The Willis Towers Watson legal team played a key role in ensuring that the project was implemented successfully and within a reasonable timeframe. The legal specialists distinguished themselves through their great commitment, expertise and negotiating skills, and at the same time were always solution-oriented and pragmatic.

Uwe Cloeser Managing Director of the pension funds of DSM Nutritional Products AG Kaiseraugst

## And what can we do for you?

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### **About WTW**

At WTW (NASDAQ: WTW), we provide data-driven, insight-led solutions in the areas of people, risk and capital. Leveraging the global view and local expertise of our colleagues serving 140 countries and markets, we help you sharpen your strategy, enhance organizational resilience, motivate your workforce and maximize performance.

Working shoulder to shoulder with you, we uncover opportunities for sustainable success — and provide perspective that moves you. Learn more at wtwco.com.



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