

# **Rendita Foundations Privacy Statement**

## **Products and services**

Rendita Vested Benefits Foundation and Rendita Pension Foundation 3a offer pension and vested benefits accounts in accordance with the Swiss Vested Benefits Act and the Ordinance on the Tax Deduction of Contributions to Recognized Pension Plans (BVV 3/OPO 3). The offering is geared exclusively to persons who are subject to social insurance legislation in Switzerland and pay taxes in Switzerland.

## **Data protection controller**

The Rendita Foundations are responsible for data collection and processing pursuant to the Federal Act on Data Protection (FADP) and the specific data protection provisions of the Federal Act on Occupational Old Age, Survivors' and Invalidity Pension Provision (BVG/OPA). Rendita Vested Benefits Foundation is deemed to be a federal body in the area of mandatory BVG/OPA benefits. Personal data is processed lawfully and in compliance with the applicable requirements of data protection legislation as well as with this Privacy Statement.

The Rendita Foundations do not use any cookies or similar technology on their website.

## **Information**

You are entitled to obtain information on the personal data that is stored and concerns you at any time. If you have data protection concerns in connection with the management and maintenance of your account, you can contact us at the following address:

Rendita Vested Benefits Foundation, Data Protection Officer, P.O. Box 4701, 8401 Winterthur

Rendita Pension Foundation 3a, Data Protection Officer, P.O. Box 4702, 8401 Winterthur

Die Datenschutzberaterin für die Rendita Stiftungen kann über die folgende E-Mail-Adresse erreicht werden: [datenschutzberater.bv@axa.ch](mailto:datenschutzberater.bv@axa.ch).

An online form is available on our website under "Contact". Please append a copy of your passport or official ID document to your query to allow us to identify you.

## **General management by AXA Life Ltd**

As general manager of Rendita Vested Benefits Foundation, AXA Life Ltd processes personal data for the purpose of maintaining and continuing occupational benefits coverage and – as general manager of Rendita Pension Foundation 3a – for the purpose of managing tied pension plans. As well as being processed for the purpose of account management for both Foundations, personal data is processed within the context of marketing activities, in particular so as provide information on new elements, changes to products and regulations, and for advertising purposes.

All processing steps – from collection to retention and destruction of this data – that take place at AXA Life Ltd or at any third parties (cloud and software providers) its commissions are carried out in accordance with the applicable statutory regulations of the FADP and the specific data protection provisions of the BVG/OPA. Those persons involved in the implementation as well as the control or supervision of the implementation of occupational pension cover are subject to the duty of confidentiality pursuant to Art. 86 BVG/OPA. In the area of tied pension cover, any disclosure and

forwarding of data to third parties takes place in accordance with the provisions of the FADP; in the area of vested benefits, this is done in accordance with the specific provisions of the BVG/OPA. In the area of vested benefits, the processing of data and the exchanging of data with other pension funds and vested benefits institutions is permitted on the basis of statutory requirements.

To facilitate the transfer of withdrawal benefits (termination benefits) in the case of vested benefits, Rendita Vested Benefits Foundation may exchange the necessary data and information via a platform for the automatic processing of a vested benefits case.

For the data protection provisions of AXA Life Ltd, please visit: [www.axa.ch/data-protection](http://www.axa.ch/data-protection)

### **Your banking partner as processor**

Your banking partner is a regional bank or large bank that works with the Rendita Foundations in the pension area. Your banking partner transmits to the Foundation your application to open an account and – at a later stage – further instructions together with the personal data required. Your banking partner advises you on securities investments in connection with your vested benefits or pension account. Please refer to your banking partner's website for the data protection information pertaining to your banking partner. All processors of the Rendita Foundations are contractually required to comply with Swiss data protection provisions and to guarantee the security of data.

### **Period during which data is kept**

We process and store your personal data for as long as is necessary to fulfill our contractual and legal obligations. The obligation to keep data is laid down by law (Art. 41 (8) BVG/OPA in conjunction with Arts. 27i and 27j BVV 2/OPO 2). In the area of tied pension provision and vested benefits, this obligation lasts from the time the account is opened until it is closed and beyond for a minimum of 10 years. Your data will be deleted once the statutory retention period has elapsed. If you require information in connection with a vested benefits/pension case dating back more than 10 years, please contact the Data Protection Officer responsible for the Foundation directly (see "Information").

### **Categories of recipients**

Applicant

Account holder, legal or contractual representative

Entitled beneficiary, their legal or contractual representative

Processor

Pension and vested benefits institutions as well as institutions providing tied pension plans

### **Disclosure abroad**

No data is disclosed abroad.