



Press release

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Version Absolue Retraite: the new retirement savings plan from UAF LIFE Patrimoine

UAF LIFE Patrimoine has announced the launch of Version Absolue Retraite, its new individual retirement savings plan aimed at the clients of its partner network of independent financial advisors.

This new offering, provided by Spirica, is fully integrated within the digital pathways offered by the platform. It has been designed to enable financial advisers to construct bespoke retirement planning solutions tailored to each customer's investment goals, through an extensive and scalable range of financial products with flexible redemption terms and the option to combine a lump-sum payment and an annuity.

Version Absolue Retraite has 5 main features:

- A two-phase contract that allows holders to build up retirement savings and receive capital and/or an additional lifetime pension; it also allows them to manage their capital after retirement age using all the terms available during the build-up phase in order to maximise the pot while regularly withdrawing the sums necessary to enjoy retirement;
- This solution helps you simplify your preparations for the future by transferring into a single system your existing individual, group* or mandatory* retirement savings plans (PERP, Madelin, PERCO, "Article 83", other PER plans, etc.);
- Three management options available all of which can be combined:
 - Target-date discretionary management by Spirica, including access to real estate and private equity asset classes;
 - Discretionary management by Active Asset Allocation with 3 different profiles to adapt to the client's individual risk profile;
 - Self-management;
- Innovative, diversified and scalable financial solutions:
 - Access to Spirica's two new vehicles, namely the Fonds Euro PER Nouvelle Génération fund and the Croissance Allocation Long Terme fund;
 - A varied financial offering with more than 700 unit-linked products, a range of sustainable development funds, 6 private equity products and the broadest real estate range on the market (SCPI, OPCI, etc.), resulting from the Version Absolue contract.
- A digitised solution from October, with independent financial advisers able to complete the subscription process online via e-signature.

Daniel Collignon, Chief Executive Officer of UAF LIFE Patrimoine: *"Version Absolue Retraite combines our know-how and expertise within a single product. This new offering is seamlessly incorporated within all the digital pathways we offer independent financial advisors and enables them to construct a tailor-made solution that meets the retirement preparation needs of individual clients, while maintaining full management control over the accumulated capital."*

**provided they have left the company or no longer belong to the relevant employee category*

About UAF LIFE Patrimoine

UAF LIFE Patrimoine, an open-architecture distribution platform, is a subsidiary of Crédit Agricole Assurances and was formed in 2015 from the merger of LifeSide Patrimoine and UAF Patrimoine. It designs and selects, manages and distributes a range of savings, retirement and personal protection solutions for wealth management professionals such as independent financial advisors. At end-2019, UAF LIFE Patrimoine had €4.2 billion in assets under management across its various ranges.

www.uaflife-patrimoine.fr

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