



Occupational benefits: Key information for 2025 at a glance

Get an overview of the **key facts and figures** for your occupational benefits.

Current key figures

Total interest for 2024

An additional deferred surplus is being credited to the retirement assets for 2024, at a rate of interest of 0.5%.

Base interest rate for 2025

For 2025, the base interest rate for changes during the course of the year is 0.0%. AXA Life Ltd will make its decision regarding supplementary interest on December 31, 2025, based on the investment performance.

Pension conversion rates

The pension conversion rate for 2024 remains unchanged at 5.0% with a retirement age of 65 for both men and women and co-insured, reversionary partner's pension and retired person's child's pension.

AIA reporting duty: CRS-I form

The Foundation has been satisfying automatic exchange of information (AEOI) requirements since 2019. It reports to the Principality of Liechtenstein Tax Administration all insureds, including the level of their accrued retirement savings, as well as every payment for an insured event.

For this reason, we need to know the tax residency of each person who is insured by the Foundation to be provided by way of self-certification.

We kindly ask you to inform your staff and to urge them to submit the CRS-I form for self-certification of an individual's tax residency (if they haven't done so already).

Insureds who have a connection with the United States (U.S. citizens, Green Card holders, working in the United States, married to a U.S. citizen, etc.) are required to report their US Tax Identification Number (TIN).

The form is available on the Foundation's website: [CRS - I: CRS-I form for self-certification of an individual's tax residency](#)

More news about your Foundation

Current composition of the Board of Trustees

- Dennis Waech, Chair, AXA Life Ltd
- Bernd Wurster, Hilcona AG, Schaan
- Felix Tromp, AXA Life Ltd

Foundation documents

The Board of Trustees has not made any amendments to the Foundation documents for 2025. You can find the current documents online under [“Downloads”](#).