



Press release

Paris, 14 June 2019

## **Octavie 3**

### **the new deferred profit-sharing life insurance plan**

#### **from UAF LIFE Patrimoine**

UAF LIFE Patrimoine is pleased to announce the launch of Octavie 3, its new deferred profit-sharing plan for Independent Financial Advisers (IFAs).

This new plan benefits from full digital integration into the UAF LIFE Patrimoine platform and has been developed in conjunction with Spirica. It has been designed to enable financial advisers to put together bespoke investment solutions tailored to each customer's investment goals, through an extensive and scalable range of financial products.

Octavie 3 is a multi-range individual deferred profit-sharing life insurance plan that is based on four pillars:

- To produce supplementary income under attractive tax conditions: any partial withdrawals during the first eight years of the plan shall not take account of deferred profit-sharing amounts.
- To maximise returns on deferred profit-sharing over the long term.
- To provide innovative, diversified and scalable financial solutions:
  - euro-denominated policies: access to the Spirica euro fund and two dynamic euro funds,
  - a variety of financial products, notably with distribution unit-linked products, structured funds and the most extensive real estate investment range on the market (REITs, real estate investment funds, etc.)
- To provide a digitised solution: financial advisers can complete the subscription process online using an electronic signature.

Daniel Collignon, Chief Executive Officer of UAF LIFE Patrimoine: *"Octavie 3 combines our know-how and expertise in a single product. This new plan draws on a wide range of digital services that enable customers and financial advisers to avail of a multitude of online transaction modules. We also wanted to incorporate our best unit-linked solutions into this plan, including a very comprehensive range of real estate and structured fund solutions, together with our new generation euro-denominated policies. Our goal is simple: to enable our partner IFAs to put together solutions that best meet the financial planning needs of each and every customer."*

**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 savings and retirement products and ensures their management and distribution through independent financial advisers. At the end of 2018, UAF LIFE Patrimoine had €3.3 billion in assets under management across its various ranges.

[www.uaflife-patrimoine.fr](http://www.uaflife-patrimoine.fr)

**Press contacts**

Françoise Bololanik + 33 (0)1 57 72 46 83 / + 33 (0)6 25 13 73 98

Géraldine Duprey +33 (0)1 57 72 58 80/ +33 (0)7 71 44 35 26

[service.presse@ca-assurances.fr](mailto:service.presse@ca-assurances.fr)

