



## Application for cash payment/transfer

**Employer**  **Contract no.**

### Insured person

Mr  Ms

Surname  First name

Street  Postcode, Place

Telephone  E-Mail

Date of birth  Insured no.

Marital status  Date of marriage

### Transfer to new pension scheme (pension fund, vested benefits foundation)

Please enclose a payment slip from the new pension scheme.

New employer  Postcode, Place

New pension scheme  Contract no.

Bank  Account no./IBAN

Opening an account with the Tellco Vested Benefits Foundation

### Cash payment of vested benefits

#### Reason for payment

#### Required documents

I am leaving Switzerland/Principality of Liechtenstein definitively and moving my residence to   
Confirmation of departure from the most recent Swiss municipality of residence (not older than 6 months) or current certificate of residence; copy of passport or identity document

The residence is located  in an EU/EFTA state \*  
 outside an EU/EFTA state

Please enclose official confirmation of departure.

Self-employment Latest confirmation from AHV compensation fund, not older than one year

Vested benefits amount to less than one annual contribution Copy of passport or identity document

Reaching the statutory retirement age  
(at the earliest 5 years before, at the latest 5 years after)

Death of the insured To be proven by the beneficiaries by submitting a death certificate, certificate of inheritance and family certificate



## Regulations according to marital status

## Required documents

- |  |   |
|--|---|
| • Married or registered partnership  | Written consent of spouse or partner and official certification of both signatures        |
| • Divorced persons or persons whose partnership has been legally dissolved | Copy of divorce decree<br>Official certificate of marital status (not older than 1 month) |
| • Persons who are single or who live in an unregistered partnership        | Official certificate of marital status (not older than 1 month)                           |

## The insured declares:

- that he/she has not purchased any additional benefits from an occupational pension fund in the last 3 years
- that he/she has purchased additional benefits from an occupational pension fund as confirmed by the enclosed certificate (enclose certificate)

## Banking details

Please enclose a payment slip.

Bank/Post

Postcode, Place

Account no.

IBAN

## Signature /s

Place, Date

Insured person

I agree to the cash payment.

Spouse or registered partner

For amounts up to CHF 10,000 we need copies of your passport or identity document.

Official certification of signature/s (for cash payments) for amounts exceeding CHF 10,000

(Justice of the peace, notary public or municipality of residence)

- \* If you are leaving Switzerland definitively and moving your residence to a EU/EFTA country or are a frontier worker residing in a EU/EFTA country and are definitively giving up your occupation in Switzerland, since 1 June 2007 you can only request cash payment of the part of your vested benefits which is above the obligatory level, if a duty to contribute to a mandatory state insurance scheme exists for you at the new place of establishment (frontier worker: at the previous domicile). The obligatory part of the vested benefits is to be invested in a vested interests account in Switzerland. You can clarify whether a duty to contribute to a mandatory state insurance scheme exists for you by using the appropriate form at [www.verbindungsstelle.ch](http://www.verbindungsstelle.ch).