

Application for cash payment / transfer

Insured

Mr Ms

Surname
 Street
 Telephone
 Date of birth
 Marital status

Account no.
 First name
 Postcode, Place
 E-Mail Insured
 no. Date of marriage 756.

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

Please enclose a QR-payment slip from the new pension scheme.

New employer Postcode, Place
 New pension scheme Contract no.
 Bank Account no. / IBAN

Cash payment of vested benefits

Reason for payment

- Leaving Switzerland or the Principality of Liechtenstein permanently
- ONLY tick this box if the vested benefits have not been held by the Tellco Vested Benefits Foundation for at least 6 months.
- Immediate payout (fee CHF 1,200.00) *
- Payment after expiry of the holding period of 6 months (fee CHF 600.00) *

Required documents

Confirmation of departure from the most recent Swiss municipality of residence (not older than 6 months) or current certificate of residence; copy of passport

If the payout is requested after a holding period of 6 months, the documents must be submitted on the payout date (confirmation of deregistration, signed payout form including official notarisation and official civil status confirmation)

Self-employment

Current confirmation of the commencement of self-employment as the main occupation from the AHV compensation fund or a copy of the last AHV contribution decree with the declared gross AHV salary (not older than one year). Documents as proof of self-employment as your main occupation (business plan, rental agreement for business premises, employment contracts with employees, contracts with customers, website, etc.).

Vested benefits amount to less than one annual contribution

Copy of current pension certificate or salary statement

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

If domiciled abroad:
current certificate of residence

Death of the insured

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

Recipient of a full disability pension from the Federal Disability Insurance (IV)

Copy of latest pension notification from the Federal Disability Insurance (IV)

Regulations according to marital status

- Married or registered partnership
- Other marital status

Required documents

Written consent of spouse or partner and official certification of both signatures, copy of passports or ID cards

Official certificate of marital status (not older than 1 month), copy of passport or ID card

* A fee of CHF 1,200.00 is charged for withdrawals of pension assets that have been with Tellco Vested Benefits Foundation for less than 6 months. The fee for all other withdrawals is CHF 600.00.

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 (Account in the name of the account holder)

Bank / Post Office	<input type="text"/>	Postcode, Place	<input type="text"/>
Account no. / IBAN	<input type="text"/>	SWIFT / BIC	<input type="text"/>

Signature / s

Place, Date	<input type="text"/>	Insured	<input type="text"/>
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I agree to the cash payment.

Spouse or registered partner

- Official certification of both signatures, not older than 1 month (for cash payments)

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