

Transfer of contract / information required from previous insurer

(based on article 53e paragraph 4^{bis} of the Swiss Federal Law on Occupational Old Age, Survivors' and Invalidity Pension Provision (BVG / OPA) which entered into force on 1 May 2007).

Company

Previous pension fund

Name

Street

Postcode, Place

Contract no.

The previous pension fund hereby confirms that:

The contract will be terminated with effect from:

☐ The premiums have been paid until this date.

☐ The outstanding premiums amount to:

of which the following have lapsed:

☐ There are currently no pension cases.

☐ There are pension cases but these will remain with the previous pension fund.

☐ There are pension cases which are to be taken on by the new pension fund.

☐ The legal provisions set out in Article 11(3^{bis}) of the OPA on co-determination in changing occupational pension providers have been adhered to.

Please send us the following documents / information:

- Claims experience for the last 5 years
- Data of the individual pension recipients*
- Pension and reversionary benefits per pension recipient
- Claims reserve and accrued retirement assets to be transferred

Signatures

The company referred to above authorises Tellco pk to obtain all information and documents in connection with the occupational pensions in accordance with Article 53 Swiss Occupational Pensions Act (OPA).

Place, Date

Employer

Place, Date

Previous pension fund (stamp and signatures)

*Surname, first name, date of birth, type of pension, annual pension, reversionary pensions, date of first pension payment, reserve for outstanding claims incl. vested benefits/capital, plus, if applicable: cause, level of disability, beginning of incapacity for work, beginning of premium waiver, salary, pensionable salary, scale for savings contributions