

Application for cash payment / transfer

The Insured

<input type="checkbox"/> Mr	<input type="checkbox"/> Ms
Surname	
Street	
Telephone	
Date of birth	
Marital status	

Portfolio no.

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

Reimbursement to a new pension fund (pension fund, vested benefits foundation)

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

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

Cash payment of vested benefits

Reason for payment

<input type="checkbox"/> Permanent departure from Switzerland or the Principality of Liechtenstein
ONLY tick this box if the vested benefits have not been held by the Tellco Vested Benefits Foundation for at least 6 months.
<input type="checkbox"/> Immediate payout (fee CHF 1,200.00) 2)
<input type="checkbox"/> Payment after expiry of the holding period of 6 months (fee CHF 600.00) 2)

Required documents

Confirmation of de-registration from the last municipality of residence (not older than 6 months), otherwise current certificate of residence, copy of passport or ID card, official civil status certificate (not older than 1 month), 1)

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)

<input type="checkbox"/> Self-employment in Switzerland	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 1 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.), copy of passport or ID card, official civil status certificate (not older than 1 month), 1)
<input type="checkbox"/> Vested benefits amount to less than one annual contribution	Copy of current pension certificate or salary statement, copy of passport or ID card, official civil status certificate (not older than 1 month), 1)
<input type="checkbox"/> Reaching the reference age (five years before at the earliest, five years after at the latest)	Copy of passport or ID card, official civil status certificate (not older than 1 month), if domiciled abroad: current certificate of residence, 1)
<input type="checkbox"/> Death of the insured	To be proven by the beneficiaries by submitting a death certificate, certificate of inheritance and family certificate, copy of the beneficiaries' passport or ID card
<input type="checkbox"/> Recipient of a full disability pension from the Federal Invalidity Insurance	Copy of latest pension notification from the Federal Invalidity Insurance, copy of passport or ID card, official civil status certificate (not older than 1 month), 1)

- 1) For married persons or persons in a registered partnership, an officially notarised signature of the spouse or registered partner is mandatory.
- 2) 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.

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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 / Swiss Post	<input type="text"/>	Postcode, Place	<input type="text"/>
IBAN	<input type="text"/>	SWIFT / BIC	<input type="text"/>

Signature / s

Place, Date	The Insured
<input type="text"/>	<input type="text"/>

I agree to the cash payment.	Spouse or registered partner
	<input type="text"/>

Official legalisation of the signature of the spouse or registered partner in the required cases (marked with 1).

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