

Application for cash payment / transfer

Portfolio no.

The Insured

Mr	Ms
Surname	First name
Street	Postcode, Place
Telephone	E-mail
Date of birth	Insured no. 756.
Marital status	Date of marriage

Reimbursement to a new pension fund (pillar 3a/buy-in into pension fund)

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

Pension fund	Postcode, Place
Bank / Swiss Post	Contract no.
IBAN	

Cash disbursement of pension assets

Third pillar retirement funds may be used to buy into the pension fund if there are gaps in the pension fund.
 (Please enclose confirmation of pension fund pension gap.)

Reason for payment

Permanent departure from Switzerland or the Principality of Liechtenstein

Self-employment in Switzerland

Reaching the reference age (five years before at the earliest, five years after at the latest)

Death of the insured

Recipient of a full disability pension from the Federal Invalidity Insurance

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)

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.). Copy of passport or ID card, official civil status certificate (not older than 1 month), 1)

Copy of passport or ID card, official civil status certificate (not older than 1 month), if domiciled abroad: current certificate of residence

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

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.

Application for cash payment / transfer

Banking details

Bank / Swiss Post

Postcode, Place

IBAN

SWIFT / BIC

Signature / s

Place, Date

The Insured

I agree to the cash payment.

Spouse or registered partner

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)