

Redemption vested benefits policy

Insured person

Policy no.

Title

Ms

Mr

First name

Last name

Street

No.

Postcode

Place

Country

Date of birth

Marital status

since, date

E-mail

Phone

New job

Do you have a new job in Switzerland?

Yes, I have a new job

No, I do not have a new job

Transfer

New employee benefit institution

Employee benefit institution

Name of the employee benefit institution

Additional name

Address

Street

Number

Postcode

Place

Country

Account details and contract number

IBAN

Account number

Reference no.

Contract number

Details of the new employer

Name of the new employer

Address

Street

Number

Postcode

Place

Country

Documents

Documents attached:

Benefit

I would like to open a vested benefits policy or vested benefits account or transfer my termination benefit to an existing vested benefits institution.

Required documents: If possible, please enclose a copy of the vested benefits application.

Name

Bank/post office (name, address)

IBAN

Enter additional vested benefits institution

Name

Bank/post office (name, address)

IBAN

I would like a cash payment...

... because I am becoming full-time self-employed and am no longer subject to the compulsory occupational benefit scheme.

Required documents: Please submit the confirmation from the OASI compensation fund. Your relevant OASI compensation fund can be found at www.ausgleichskasse.ch. You can attach the documents as a file at the end of this form.

Note: Please note that the application for cash payment must be submitted within one year of starting full-time self-employment.

... because I am definitively leaving Switzerland/Liechtenstein.

Required documents: Please enclose the certificate of deregistration from the municipality (Switzerland/Liechtenstein) and the confirmation that the social security obligation of the security fund in Bern has been clarified. If the person is moving to a country outside the EU/EFTA, proof of the social security obligation is not required.

You can obtain the relevant form directly from www.verbindungsstelle.ch. You can attach the documents as a file at the end of this form.

Note: A payment will be made in Swiss francs (CHF). Only in countries where the local currency is EUR, GBP or USD will payments be made in the relevant local currency.

... because I am a cross-border commuter and am definitively giving up my gainful activity in Switzerland/Liechtenstein.

Required documents: Please enclose confirmation of the clarification of the social security obligation from the Security Fund, Bern.

You can obtain the relevant form directly from www.verbindungsstelle.ch. You can attach the documents as a file at the end of this form.

... because my termination benefit is less than my annual contribution (insignificance of the termination benefit).

- ... because I receive a full DI pension (please attach confirmation of the Swiss federal disability insurance or a copy of the pensions entitlement)

Payment of retirement benefit

- I would like the retirement benefit to be paid out

Note: Possible during the last 5 years before reaching the ordinary OASI retirement age (Art. 16 para 1 OV).

Comments if the vested benefit is split between two foundations

Payment details

Bank/post office, name, branch

Postcode, place

Account number

Reference no.

IBAN

SWIFT/BIC code

Account holder

Name

First name

Street and number

Postcode, place

Is a transfer of residence abroad planned?

- No
 Yes

By when?

Tax related aspects of cash payments

The tax authorities may regard the capital withdrawal as circumvention if purchases were made within three years of any capital withdrawal. The tax authorities may consider all the 2nd Pillar pension arrangements of a person as a whole and generally do not recognise the deductibility of purchases made during this period. This may lead to a supplementary tax procedure. The insured is in any case responsible for the tax consequences of the capital withdrawal.

It is recommended that prior clarification be obtained from the relevant tax authority.

Data protection

All personal data will be processed in accordance with the current legislation:

For compulsory occupational benefits, the data protection regulations of LOB (Art. 85a ff. LOB) apply. The provisions of the FADP apply in addition. The FADP applies to purely supplementary occupational benefits (for information e.g. identity and contact details of responsible persons, processing purposes, etc. please see www.helvetia.ch/privacy).

By signing below, the insured person confirms that they wish to maintain benefit coverage in the form described above, and that in the case of payment in cash (other than marginal termination benefit), they are no longer subject to the obligatory occupational benefit scheme.

For single, divorced or widowed persons, a confirmation of marital status is mandatory for payment in cash.

Place and date

Signature of the insured person

In the event of a cash payment, an original officially-certified signature of the spouse or registered partner, as the case may be, is mandatory. Certification must be carried out by a notary, the certification office of the municipality or state chancellery of the place of residence or Canton or an equivalent official body. A signature authenticity check by a Helvetia general or main agency is also acceptable. Signing must take place in the presence of the person certifying the signature. A signed passport or identity card must be produced.

Place and date

Signature of spouse or registered partner

Official certification of the signature of your spouse or registered partner in the original:
