

simple. clear. helvetia.
Your Swiss Insurer

Postal address
Helvetia Insurance
P.O. Box 99
8010 Zurich

Industry-specific early retirement solution

Employer

Company

Contract number

Applicant

Policy no.

Title

☐ Ms

☐ Mr

First name

Last name

Street

No.

Postcode

Place

Country

Date of birth

Marital status

E-Mail

Telephone

Are you liable to tax withholding?

☐ No

☐ Yes

Selection of early retirement solution

Please select your desired early retirement solution:

- ☐ Continuation of the occupational pension plan as an individual member
- ☐ Transfer of your termination benefit to a vested benefits institution
- ☐ Early retirement with withdrawal of a retirement pension or a capital payment of the old age savings

Note: When the retirement capital is paid out, all claims to any benefits, in particular survivors' pensions and retired person's children's pensions, lapse proportionately.

Note: Please note that according to the regulations of the foundation you will no longer be able to earn retirement credits or request the continuation of the occupational pension plan when you choose an early retirement pension or an early capital payment.

Please select your desired retirement benefit:

- ☐ Early retirement with withdrawal of a life-long retirement pension
- ☐ Early retirement with withdrawal of a one-time retirement capital
- ☐ Early retirement with a partial withdrawal of retirement capital in % or as a fixed amount (the remaining retirement savings are paid out as a pension)

Partial retirement capital in %

Partial retirement capital as a fixed amount

Continuation of the occupational pension plan

Required documents

To assist us in assessing your application, please send us **a copy of the definitive benefits decision of your employer's foundation managing the early retirement scheme under a collective employment agreement**. You can also submit this online together with the signed application.

Application and data processing

The undersigned hereby applies for admission as an individual member in accordance with the supplementary conditions for the industry-specific early retirement solution for former insured persons managed by Helvetia Collective Foundation or Helvetia LOB Invest, as the case may be (hereinafter Helvetia). Helvetia Collective Foundation or Helvetia LOB Invest, as the case may be may reject an application without giving reasons.

Where necessary, Helvetia may independently gather from the former employer, or from the foundation managing the early retirement scheme under a collective employment agreement, the applicant's personal data it requires to admit that applicant as an individual member and to manage or terminate the latter's pension insurance. To this extent, the foundation managing the early retirement scheme under a collective employment agreement and the former employer are released from their duty of confidentiality as regards the applicant's personal data. Helvetia may be required to disclose personal data gathered for pension insurance to the bodies performing control activities in accordance with the rules of the foundation managing the early retirement scheme under a collective employment agreement as well as to any third parties named by them. To this extent, Helvetia is released from its duty of confidentiality as regards personal data.

The undersigned hereby applies for admission as an individual member in accordance with the benefit supplementary conditions for the industry-specific early retirement solution for former insured persons managed by Servisa Collective Foundation (hereinafter Servisa). Servisa Collective Foundation may reject an application without giving reasons.

Where necessary, Servisa may independently gather from the former employer, or from the foundation managing the early retirement scheme under a collective employment agreement, the applicant's personal data it requires to admit that applicant as an individual member and to manage or terminate the latter's pension insurance. To this extent, the foundation managing the early retirement scheme under a collective employment agreement and the former employer are released from their duty of confidentiality as regards the applicant's personal data. Servisa may be required to disclose personal data gathered for pension insurance to the bodies performing control activities in accordance with the rules of the foundation managing the early retirement scheme under a collective employment agreement as well as to any third parties named by them. To this extent, Servisa is released from its duty of confidentiality as regards personal data.

Declaration of consent

You will find the supplementary conditions and further relevant information at www.helvetia.ch.

The applicant confirms that he/she has read and understood the supplementary conditions for the industry-specific early retirement solution for former insured persons of Helvetia Collective Foundation or Helvetia LOB Invest, as the case may be. He/she declares that he/she is in agreement with the contents thereof.

By signing this application, the applicant gives his/her consent to data processing.

You will find the supplementary conditions and further relevant information at www.servisa.ch.

The applicant confirms that he/she has read and understood the supplementary conditions for the industry-specific early retirement solution for former insured persons of Servisa Collective Foundation. He/she declares that he/she is in agreement with the contents thereof.

By signing this application, the applicant gives his/her consent to data processing.

Transfer to a vested benefits institution

Please transfer my termination benefit to the vesting institution named below so that a vested benefits account or vested benefit policy can be set up.

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

Vesting institutions

Name Bank/post office (name, address) IBAN

Withdrawal of the retirement benefits

Account details

Bank/post office, name, branch Postcode, place

☐ IBAN

☐ Account number

IBAN Account number Reference no. SWIFT/BIC code

Account holder

First name Name Street and number Postcode, place

In the event of capital withdrawal, an original certificate of civil status is mandatory for single, divorced or widowed persons.

Place and date

Signature

In the event of capital withdrawal, an 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. Signing must take place in the presence of the person certifying the signature. A signed passport or identity card must be produced.

By signing this form, the spouse or registered partner confirms the payment to the above-mentioned account when drawing a retirement benefit:

Place and date

Signature of spouse or registered partner

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

Tax aspects of a capital withdrawal

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).