

## Application for cash payment/transfer

**Employer**  **Contract no.**

### Insured person

Mr  Ms

Surname  First name

Address  Postcode, Place

Telephone  E-Mail

Date of birth  Insured no.

Marital status  Date of marriage

### Transfer to new pension scheme (pension fund, vested benefits foundation)

Please enclose a payment slip from the new pension scheme.

New employer  Postcode, Place

New pension scheme  Contract no.

Bank  Account no./IBAN

### Cash payment of vested benefits

Reason for payment	Required documents
<input type="checkbox"/> I am leaving Switzerland/Principality of Liechtenstein definitively and moving my residence to <input type="text"/> The residence is located <input type="checkbox"/> in an EU/EFTA state * <input type="checkbox"/> outside an EU/EFTA state Please enclose official confirmation of departure.	Confirmation of departure from the most recent Swiss municipality of residence (not older than 6 months) or current certificate of residence
<input type="checkbox"/> Cross-border commuter: Giving up employment in Switzerland permanently	Confirmation of deposit of work permit by the Migration Office or copy of the employment contract with the new foreign employer
<input type="checkbox"/> Self-employed activity as primary occupation	Current confirmation from the AHV compensation fund referring to self-employment as primary occupation. Self-employment may not have started longer than one year ago.
<input type="checkbox"/> Vested benefits amount to less than one annual contribution	
<input type="checkbox"/> Reaching the statutory retirement age (at the earliest 5 years before, at the latest 5 years after)	
<input type="checkbox"/> Death of the insured	To be proven by the beneficiaries by submitting a death certificate, certificate of inheritance and family certificate

**Regulations according to marital status**

**Required documents**

- |  |   |
|--|---|
| • Married or registered partnership  | Written consent of spouse/partner   |
| • Divorced persons or persons whose partnership has been legally dissolved             | Copy of divorce decree<br>Official certificate of marital status (not older than 1 month) |
| • Persons who are single or who live in an unregistered partnership or widowed persons | Official certificate of marital status (not older than 1 month)                           |

**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**

Please enclose a payment slip.

Bank/Post	<input type="text"/>	Postcode, Place	<input type="text"/>
Account no.	<input type="text"/>	IBAN	<input type="text"/>

**Signature / s**

Place, Date	<input type="text"/>	Insured person	<input type="text"/>
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I agree to the cash payment.	Spouse or registered partner
<input type="text"/>	<input type="text"/>

For amounts up to CHF 10,000 we need copies of the spouse/partner passport or identity document.

Official certification of signature of the spouse/partner (for cash payments) for amounts exceeding CHF 10,000

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

\* If you are leaving Switzerland definitively and moving your residence to a EU/EFTA country or are a frontier worker residing in a EU/EFTA country and are definitively giving up your occupation in Switzerland, since 1 June 2007 you can only request cash payment of the part of your vested benefits which is above the obligatory level, if a duty to contribute to a mandatory state insurance scheme exists for you at the new place of establishment (frontier worker: at the previous domicile). The obligatory part of the vested benefits is to be invested in a vested interests account in Switzerland. You can clarify whether a duty to contribute to a mandatory state insurance scheme exists for you by using the appropriate form at [www.verbindungsstelle.ch](http://www.verbindungsstelle.ch).