

# Transfer of portable sum

## Transfer of vested benefits from previous Swiss benefits schemes

According to the federal law on occupational retirement, disability and survivors' benefits schemes (BVG) the following assets from the Swiss benefits schemes have to be transferred to the Syngenta Pension Fund:

- The vested benefits (portable sum) from a previous Swiss occupational benefits schemes
- Occupational benefits in vested benefits institutions and/or vested benefits policies

**Please complete and sign the confirmation below and return it to the Syngenta Pension Fund.**

Surname \_\_\_\_\_ First name \_\_\_\_\_

Personnel number \_\_\_\_\_

- I am **not yet 25 years old** and have therefore **not acquired any vested benefits**.
- I herewith confirm that I have transferred or **initiated the transfer of all vested benefits** from a previous Swiss occupational benefits scheme **to the Syngenta Pension Fund**.

## Vested benefits from previous employers in Switzerland

- I have vested benefits accounts or policies (excluding Pillar 3a) that I have not transferred to the Syngenta Pension Fund
- NO
- YES If YES: value in CHF \_\_\_\_\_ as at (Date) \_\_\_\_\_
- (Please indicate total sum of all vested benefits & enclose copies of the last statements)

## Purchases

- I have made voluntary contributions to a Swiss occupational benefits scheme over the last 3 years.

Date of purchase	Amount
_____	_____
_____	_____

## Relocation from abroad (residence in Switzerland)

I moved here from abroad within the last 5 years **to take up my residence in Switzerland**

- NO
- YES Date of moving from abroad \_\_\_\_\_

If YES: I have already been insured once under an occupational benefits scheme in Switzerland

- NO
- YES

(please enclose copies of the pension statements and/or exit statements)

With my signature I confirm that the above information is correct.

Place, date \_\_\_\_\_ Signature \_\_\_\_\_

