

Retirement

Retirement date _____

Partial retirement _____ %

Surname _____

First name _____

Address _____

Postcode, town _____

E-Mail (optional) _____

1. Retirement benefits

The retirement benefit is paid out in the form of a pension and/or a lump sum. If a lump sum is paid out, the pension and the co-insured benefits spouse's pension, child and orphan's pensions) are reduced on a pro rata basis. You can use the retirement savings available at the time of retirement to finance the following benefits:

☐ Annual bridging pension up to AHV age (max. CHF 29'400) _____

☐ Lump-sum payment to the value of _____

☐ Retirement pension (from remaining capital)

☐ 100 % lump-sum payment (no pension and no survivors' benefits)

ATTENTION

If you have made voluntary extra contributions within three years before retirement and should you wish to opt for a lump sum payment, it is advisable, to ask your tax authority to provide you with **a written and binding confirmation concerning the tax deductibility** of your previous voluntary extra contributions and to enquire about the **consequences of any subsequent lump sum payments**.

2. Child pensions

For children, a child pension will be paid out up to the age of 20. Children who are still in education or are of diminished capacity/unfit for work are entitled to this pension up to the age of 25. The pension fund must be notified immediately if the education is terminated or interrupted early. Wrongfully received child pensions must be repaid to the Pension Fund. For each child (older than 20), a certificate confirming the studies or apprenticeship contract must be sent to us for perusal.

Surname and first name

Date of birth

Nature of education

(at 20 years or older)



3. Payment addresses

a) Monthly pension

(no splitting possible)

- ☐ Post office account
☐ Bank account

Name of the bank _____

Address _____

Postcode, town _____

IBAN no. _____

Bank account / Post office account _____ SWIFT code _____

b) Lump-sum payment

(no splitting possible)

- ☐ Post office account
☐ Bank account

Name of the bank _____

Address _____

Postcode, town _____

IBAN no. _____

Bank account / Post office account _____ SWIFT code _____

Place, date _____ Signature _____

Authentication of signature (spouse):

In case of a lump-sum payment, the spouse* confirms the capital withdrawal of:

☐ CHF _____ ☐ 100% lump-sum

Signature of the spouse: _____

*In the case of married insured members, the written consent of the spouse is required in form of an authenticated signature
(signature officially certified by a notary or municipal authority)

Enclosure

- Certificate confirming the child's studies or the apprenticeship contract for children over 20
- Copy of family register or marriage/birth certificates; passport copy of the spouse
- Certificate of civil status (for single or divorced insured members) / divorce decree if no certificate of civil status can be provided
- Copy of bank card incl. IBAN no.

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