

Application for cash payment / transfer

Employer **Contract no.**

Insured person

Mr Ms

Surname First name
 Street Postcode, Place
 Telephone (private) E-Mail (private)
 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

Opening an account at the Tellco Vested Benefits Foundation

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"/> Self-employed activity as primary occupation	<ul style="list-style-type: none"> – OASI funding confirmation with declared OASI gross annual income including copy of application for OASI – Copy of passport/ID of spouse/partner with legible signature – Self-employment may not have started longer than one year ago.
<input type="checkbox"/> Vested benefits amount to less than one annual contribution of the insured person	
<input type="checkbox"/> Reaching the statutory retirement age (no earlier than 7 years prior to this and no later than 5 years afterwards)	
<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 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

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"/>

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.