

Application to Withdraw Vested Benefits

Vested benefits account number(s): _____

Unless otherwise specified by the account holder, all existing vested benefits accounts will be closed.

Mr. Ms. (hereinafter the "Account Holder")

Social insurance number: _____

Last name: _____

First name: _____

Street/No.: _____

Postal code, city/town, country: _____

Date of birth (dd/mm/yyyy): _____

Telephone: _____

Civil status (documents to be submitted depending on civil status)

Single

- Proof of civil status (issued no more than one month prior to date of withdrawal), if amount is CHF 10,000 or more

Married or registered partnership

- Copy of spouse's or registered partner's passport or ID

Divorced or legally dissolved partnership

- Proof of civil status (issued no more than one month prior to date of withdrawal), if amount is CHF 10,000 or more
- Swiss divorce decree with confirmation of legal validity or a foreign divorce decree (recognized and declared enforceable by a Swiss court)

Widowed

- Proof of civil status (issued no more than one month prior to date of withdrawal), if amount is CHF 10,000 or more

Reason for payment please check as appropriate:

Legal retirement age (as per BVG) reached

- Current certificate of residence (issued no more than one month prior to date of withdrawal), if amount is CHF 10,000 or more
- Copy of Account Holder's passport or ID

Early withdrawal of retirement benefits (no more than five years before reaching legal retirement age as per BVG)

- Current certificate of residence (issued no more than one month prior to date of withdrawal), if amount is CHF 10,000 or more
- Copy of Account Holder's passport or ID

Drawing a full disability pension from Swiss Federal Disability Insurance

- Confirmation from Federal Disability Insurance indicating degree of disability (no more than six months old on the payment date)
- Current certificate of residence (issued no more than one month prior to date of withdrawal), if amount is CHF 10,000 or more
- Copy of Account Holder's passport or ID

Transfer to a new pension fund

- Confirmation of new pension fund, including payment instructions

Marginal retirement assets

The previous annual contribution to a pension fund must be greater than the balance on the vested benefits account.

- Salary certificate, pension fund certificate, or salary statement
- Current certificate of residence (issued no more than one month prior to date of withdrawal), if amount is CHF 10,000 or more
- Copy of Account Holder's passport or ID

Permanent departure from economic region of Switzerland and Liechtenstein

- Confirmation of departure from the Swiss municipality (issued no more than one month prior to date of withdrawal), otherwise an additional current confirmation of residence (no more than 1 month old, provided the departure from the country was no longer than 1 month ago)
- Copy of Account Holder's passport or ID

Commencement of self-employed status in Switzerland (withdrawal allowed within one year)

The Account Holder confirms that the primary means of income is self-employment.

- Current confirmation from Old Age and Survivors' Insurance (AHV) compensation office
- Copy of Account Holder's passport or ID
- Salary certificate (if other gainful employment is also pursued)

Please note that in order to receive the pension benefits for residential property or on the death of the insured person, a separate application for withdrawal is required.

Original for the Foundation

The Account Holder declares:

In the past three years, I have purchased additional benefits to cover missing contribution years or early retirement:

No Yes (If so, please attach attestations)

Any additional retirement benefits you have purchased may not be withdrawn as a lump sum during the next three years. Nevertheless, if you make a lump-sum withdrawal before the end of the three-year period after having purchased additional benefits, you will need to consult your tax office about the tax consequences.

Amount pledged (please enclose release of pledge)

The Account Holder also declares that the reason for withdrawing the benefits is truthful and acknowledges that, on payment of this amount, any further claim against the Rendita Vested Benefits Foundation shall be waived and that the capital will be subject to taxation.

Transfer of vested benefits (permitted only to an account in the Account Holder's name)

Total amount (account will be closed)

Name of bank:

IBAN/post office account no.:

Account Holder:

Signature

1. The specified reasons for payment (with the exception of "Transfer to a new pension fund") can be invoked only with the written consent of the spouse or registered partner.
2. **Payment amounts of CHF 10,000 and higher require the notarized signature of the spouse or registered partner. The signature must be notarized on this form.**

Place, date:

Signature of Account Holder:

Signature of spouse or registered partner:

X

X

Attestation of signature of the spouse or registered partner is required for withdrawals of CHF 10,000 or more.

Attestation: Stamp and signature of notary or municipality.

General information

Only correct and complete applications will be processed.

Please note that the Foundation is entitled to conduct further investigation and request the submission of additional documents.

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