

Application to Withdraw of Pension Benefits

Pension benefits account number(s): _____

Mr. Ms. (hereinafter the "account holder")

Social security number: _____

Last name: _____

First name: _____

Street/No.: _____

Postcode/Town/Country: _____

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

Telephone: _____

Civil status please check as appropriate: ☒

Single

Divorced or legally dissolved partnership

Married or registered partnership

Widowed

Reason for payment

AHV reference age reached

- Confirmation of domicile (issued no more than 3 months 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 the AHV reference age)

- Confirmation of domicile (issued no more than 3 months 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)
- Confirmation of domicile (issued no more than 3 months prior to date of withdrawal, if amount is CHF 10,000 or more)
- Copy of account holder's passport or ID

Transfer to another recognised benefits institution

- Confirmation of new pension fund, including payment instructions

Permanent departure of Switzerland

- Confirmation of deregistration from the Swiss municipality if departure from Switzerland was more than 3 months ago in addition to confirmation of domicile from the new place of residence (no more than 3 months old)
- Copy of passport/ID of the insured person and spouse or registered partner
- Individual civil status certificate (issued no more than 3 months prior to date of withdrawal, if unmarried and if amount is CHF 10,000 or more)
- Notarised signature of spouse or registered partner, if amount is CHF 10,000 or more

Commencement of self-employed status or changing the form of self-employment 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 passport/ID of the insured person and spouse or registered partner
- Individual civil status certificate (issued no more than 3 months prior to date of withdrawal, if unmarried and if amount is CHF 10,000 or more)
- Notarised signature of spouse or registered partner, if amount is CHF 10,000 or more
- Salary certificate (if other gainful employment is also pursued)

Purchase of pension fund benefits

- Purchase calculation incl. payment instructions

Change in the matrimonial property regime or divorce/court decision to end the registered partnership

- Newly notarised marriage contract (matrimonial property regime)
- Legally valid court ruling (divorce)

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.

The account holder declares:

Amount pledged (please enclose release of pledge)

I have provided truthful reasons as the basis of the benefits claim, and I acknowledge that upon payment of this amount, any further claim against the Rendita Pension Foundation 3a shall be waived and that the capital will be subject to taxation.

Note on processing

Only correct and complete withdrawal applications containing all accompanying documents will be processed. Please note that the Foundation is entitled to conduct further investigation and request the submission of additional documents.

Securities investments will be sold to the required extent once the withdrawal application has been approved. If you wish for the securities investments to be sold immediately, i.e. before your withdrawal application has been approved, please submit a separate sell order.

Transfer of pension benefits (permitted only to an account in the account holder's name)

Total amount (account will be closed)

Partial payment CHF _____

(possible only when purchasing pension benefits or changing the matrimonial property regime)

Name of bank:

IBAN/Account no.:

Account holder (name, postcode and town):

Date of payment:

Signature

For the payment reasons «Permanent departure of Switzerland» and «Commencement of self-employed status or changing the form of self-employment in Switzerland» the notarised signature of the spouse or registered partner is required for a disbursement amount of CHF 10,000 or more. The certification must be on the front or back of this form and contain the following details:

Full name (of spouse or registered partner), date of birth, ID number, place of residence, date of certification in the presence of a notary or municipal authority, stamp.

Place/Date:

Signature of account holder:

Signature of spouse or registered partner:

X

X

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Exemplar for the client

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Place/Date:

Signature of account holder:

Signature of spouse or registered partner:

X _____

X _____