

Application to Withdraw of 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 security number: _____

Last name: _____

First name: _____

Street/No.: _____

Postcode/Town/Country: _____

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

Telephone: _____

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

Single

- Individual civil status certificate (issued no more than 3 months 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 (with the exception of "Transfer to a new pension fund")

Divorced or legally dissolved partnership

- Individual civil status certificate (issued no more than 3 months 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

- Individual civil status certificate (issued no more than 3 months prior to date of withdrawal, if amount is CHF 10,000 or more)

Reason for payment please check as appropriate:

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 a new pension fund (individual civil status certificate not required)

- Confirmation of new pension fund, including payment instructions

Marginal retirement assets

Marginal retirement assets are said to exist when your vested benefits capital is less than your last annual contribution to the pension fund and you are currently not insured under any pension fund.

- Last salary certificate, pension fund certificate, or salary statement prior to leaving the pension fund
- Copy of account holder's passport or ID

Permanent departure from economic region of Switzerland and Liechtenstein

- 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 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.

The account holder declares:

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

No Yes (please attach attestations)

Any additional retirement benefits you have purchased may not be withdrawn as a lump sum during the next three years. If you nevertheless 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)

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 Vested Benefits Foundation 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 vested benefits (permitted only to an account in the account holder's name)

Total amount (account will be closed)

Name of bank:

IBAN/Account no.:

Account holder (name, postcode and town):

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. **The notarized signature of the spouse or registered partner is required by law. From a payout amount of CHF 10,000 (apart from "Transfer to a new occupational benefits institution"), 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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Place/Date:

Signature of account holder:

Signature of spouse or registered partner:

X

X