

Information Sheet

Cash Payment of Occupational Pension Fund Assets on Leaving Switzerland Permanently from June 1, 2007

Dear Client

Under the treaty on the free movement of persons between the EU/EFTA and Switzerland, the mandatory portion of vested retirement benefits may be paid out in cash only if the insured is no longer subject to mandatory insurance contributions in the EU or EFTA country in which he or she is resident. The actual date of the insured's permanent departure from Switzerland is decisive in determining whether the new regulation applies. If the insured departed after May 31, 2007, any cash payment is subject to the new regulation.

For this reason, we can only permit you to receive the extra-mandatory portion as a cash payment. To receive the mandatory portion, you must provide evidence that, under the laws applicable in your country of residence, you no longer need to be insured for retirement, death and disability benefits.

The LOB Guarantee Fund is responsible for assessing this evidence. You can obtain the necessary application form from the address given below. Once it has made the necessary investigations, the Guarantee Fund will inform you whether you can also receive the mandatory portion as a cash payment.

Contact address:

LOB Guarantee Fund
Branch
P.O. Box 1023
3000 Berne 14
Phone +41 31 380 79 71
Fax +41 31 380 79 76
www.verbindungsstelle.ch