

Application for cash payment / transfer

Employer		Contract no.	
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Insured person

	☐ Mr	☐ Ms	
Surname			First name
Street			Postcode, Place
Telephone (private)			E-Mail (Privat)
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 Tellico Vested Benefits Foundation

Cash payment of vested benefits

Reason for payment

☐ I am leaving Switzerland / Principality of Liechtenstein definitively and moving my residence to
The residence is located
☐ in an EU / EFTA state *
☐ outside an EU / EFTA state

Required documents

Confirmation of departure from the most recent Swiss municipality of residence (not older than 6 months) or current certificate of residence.

Please enclose official confirmation of departure.

☐ Self-employed activity as primary occupation

- 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.

☐ Vested benefits amount to less than one annual contribution of the insured person

☐ Reaching the statutory retirement age (no earlier than 7 years prior to this and no later than 5 years afterwards)

☐ 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

- Married or registered partnership
- Divorced persons or persons whose partnership has been legally dissolved
- Persons who are single or who live in an unregistered partnership or widowed persons

Required documents

- Written consent of spouse / partner
- Copy of divorce decree
Official certificate of marital status (not older than 1 month)
- 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

Bitte legen Sie einen Einzahlungsschein bei.

Bank / Post		Postcode, Place	
Account no.		IBAN	

Signature/s

Place, Date

Insured person

I agree to the cash payment.

Spouse or registered partner

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.