

# Form for the Cash Payment of Vested Benefits



**Schindler**

Schindler Pension Fund  
Zugerstrasse 13  
6030 Ebikon

Surname \_\_\_\_\_  
First name \_\_\_\_\_  
Marital status \_\_\_\_\_

*(Unmarried persons: include official confirmation of status)*

Address \_\_\_\_\_

AHV no. \_\_\_\_\_  
Leaving date \_\_\_\_\_  
Company \_\_\_\_\_

This form consists of two pages, which must be completed fully and truthfully, dated, signed and returned to us. The required supporting documents must also be enclosed. In the case of incomplete forms, or those for which the required documents are not supplied, we will open a vested benefits account with the Vested Benefits Foundation of UBS AG without further notice to the insured. For further information, please contact the Schindler Pension Fund at +41 41 445 31 39.

## Cash Payment of Vested Benefits In Accordance with Art. 5 FZG

- I hereby exercise my right to cash payment, and declare that the transfer satisfies all current and future claims against the Schindler Pension Fund.
- I have not made any additional voluntary contributions to the Pension Fund in the past 3 years
- In the past 3 years, I have made additional voluntary contributions of CHF \_\_\_\_\_ to the Pension Fund  
Value date ..... (In the case of several AVCs, include a separate list with the name of the Pension Fund, date and amount of each individual AVC)

## Payment Address (in Switzerland)

### Bank account

Name of bank \_\_\_\_\_  
Postcode/town \_\_\_\_\_  
IBAN no. \_\_\_\_\_  
Account-holder \_\_\_\_\_

### Post office account

Post office account. \_\_\_\_\_  
Account-holder \_\_\_\_\_

## Signatures and Official Notarisation

*Official notarisation is compulsory for cash payments in excess of CHF 5000.*

Signature of Insured  
*Please enclose a copy of your passport or ID card!*

Consent of spouse \*

Official notarisation of the spouse's signature  
*Stamp and signature of the commune or a notary*

\_\_\_\_\_  
Place and date

\* *With my signature, I declare that I consent to my spouse's vested benefits being paid out in cash, and that I have been notified that such transfer satisfies all current and future claims against the Schindler Pension Fund (including survivors' pension and adjustments in line with inflation.)*

# Form for the Cash Payment of Vested Benefits

Surname: \_\_\_\_\_ First name: \_\_\_\_\_ AHV no. \_\_\_\_\_

**Self-Employment (Valid in Switzerland Only)**

Required document

- Confirmation from your Compensation Office that you are registered as self-employed in your primary occupation.

**Permanent Departure from Switzerland**

**Destination**

Liechtenstein For persons settling in Liechtenstein, vested benefits from the Swiss pension institution will be transferred to the new employer's pension scheme.

- Please use the corresponding form, "Transfer of Vested Benefits to New Employer's Pension Fund".

European Union, Iceland or Norway Under international treaties between Switzerland and EU/EFTA states, only the non-compulsory portion of your vested benefits may be paid out in cash. The compulsory BVG portion must be transferred to a vested benefits account with a Swiss bank or to a vested benefits policy with a Swiss life insurance company (see below for exceptions).

- I am leaving Switzerland permanently **and in the future will continue to be covered by mandatory pension provision for the risks associated with old age, death and disability** in accordance with the statutory provisions applicable in a Member State of the European Union (EU), Iceland or Norway

Documents required for the cash payment of the non-compulsory portion of vested benefits:

- For Swiss nationals: confirmation of de-registration from Swiss commune of residence;
- For foreign nationals: confirmation from the immigration authorities of definitive cancellation of work/residence permit in Switzerland (it is a condition of payment of the non-compulsory vested benefits that the person will no longer work in Switzerland);
- For foreign nationals who did not work in Switzerland: confirmation of permanent residence from your country of residence (it is a condition of payment of the non-compulsory portion of vested benefits that the person in question no longer intends to work for a Swiss company).

Documents required for the payment of the **compulsory** portion of vested benefits:

- Copy of the application to open a vested benefits account / vested benefits policy.

**Exception**

To pay out the compulsory portion of vested benefits in cash, we require confirmation that you are not subject to the social security system in your new country of residence. This is issued by the Liaison Office for the BVG/LOB Guarantee Fund in Bern. If you have further questions, please contact the BVG/LOB Guarantee Fund ([www.sfbvg.ch](http://www.sfbvg.ch) – "Liaison Office"), Tel. +41 31 380 79 71.

Third countries

- I am leaving Switzerland permanently

Required documents: see above, under the documents required for the cash payment of the **non-compulsory** portion of vested benefits.

Place/date

Signature

\_\_\_\_\_

\_\_\_\_\_