



Application for cash payment / transfer

Employer**Contract no.****Insured person**☐ Mr ☐ Ms

Surname

First name

Street

Postcode, Place

Telephone (private)

E-Mail (private)

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 Tellco Vested Benefits Foundation**Cash payment of vested benefits****Reason for payment****Required documents**☐ I am leaving Switzerland / Principality of Liechtenstein
definitively and moving my residence to

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

The residence is located ☐ in an EU / EFTA state*☐ outside an EU / EFTA state

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	Required documents
– Married or registered partnership	Written consent of spouse / partner
– Divorced persons or persons whose partnership has been legally dissolved	Copy of divorce decree Official certificate of marital status (not older than 1 month)
– Persons who are single or who live in an unregistered partnership or widowed persons	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

Please enclose a payment slip.

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.