

Payment details for my vested benefits

Surname	_____	First name	_____
Civil status	_____	E-mail	_____
Date of departure	_ . _ . _ _	SC no.	_____
Employer	_____	Contract no.	_____

- 1. I have a new employer and a new pension fund**
(Confirmation letter of the new pension fund incl. account details enclosed)

Name of the new pension fund _____

Address of the new pension fund _____

IBAN of the new pension fund _____

Employer or contract number _____

- 2. I do not have a new employer and have opened a vested benefits account**
(Copy of the opening application enclosed)

Name of the vested benefits foundation _____

IBAN of the vested benefits account _____



From the age of 58

Please note the point below and tick it as necessary.

- I have reached the age of 58 on the termination date and confirm that I will continue to work or that I am registered as unemployed with the Unemployment Insurance Authority. If Profond does not receive any notification within three months of leaving the pension relationship, the retirement benefits are automatically due on the date of departure.

- 3. I apply for cash payment as the result of starting freelance work**



Documents: Please enclose the "Application for cash payment upon taking up self-employment". You can find this form under downloads at www.profond.ch

- 4. I apply for cash payment due to low value**
(The vested benefit is lower than my personal annual contribution according to the pension card)

Insured person's bank _____

IBAN _____ BIC/SWIFT _____

- 5. For cross-border commuters: I apply for cash payment after final cessation of gainful employment in Switzerland**
Please also answer question 6 (residence outside EU/EFTA) or 7 (residence inside EU/EFTA)

- 6. I apply for cash payment of my vested benefits in full** due to final departure to a country outside the EU/EFTA area.
The entire vested benefits less Withholding Tax will be transferred to my private account.



Documents: Please submit the following documents:

- Final confirmation of official deregistration from place of residence in Switzerland
- Cross-border commuters should also enclose confirmation of return of the Migration Office work permit.

Insured person's bank _____

IBAN _____ BIC/SWIFT _____

7. I apply for cash payment of my vested benefits due to final departure to a country inside the EU/EFTA area.

The **BVG vested benefit** will be transferred to my vested benefits account (details under Item 2). The **supplementary portion of the vested benefits** less Withholding Tax will be transferred to my private account.

If you are **not** subject to compulsory social security payments in the new country of residence, you may request cash payment of the **entire vested benefits** (BVG vested benefits incl. supplementary cover). The form required to substantiate the lack of compulsory insurance in the new country of residence can be downloaded from the website of the BVG Guarantee Fund (www.verbindungsstelle.ch) and submitted to the BVG Guarantee Fund as an original copy:
BVG Guarantee Fund, Eigerplatz 2, PO Box 1023, 3000 Bern 14



Documents: Please submit the following documents:

- **Final confirmation of official deregistration** from place of residence in Switzerland
- **Cross-border commuters** should also enclose confirmation of return of the Migration Office work permit.
- **Copy of application form to BVG Guarantee Fund**, if payout of the entire vested benefits (BVG vested benefits incl. supplementary cover) is requested.

We will withhold payment until a final decision has been made by BVG Guarantee Fund.

Insured person's bank

IBAN

BIC/SWIFT

Confirmation

The insured person and – insofar as they are married or living in a registered partnership – their spouse or their registered partner acknowledges/acknowledge that pension cover ceases upon cash payment and all claims against Profond have been satisfied.

Place, date

Signature of insured person

Place, date

Spouse's or registered partner's signature

Official certification of spouse's/registered partner's signature by notary or local authority
(Only required for cash payments **above CHF 5000**)



Documents: If cash payments are **less than** CHF 5000, please submit a copy of the official identity document of the spouse or registered partner. **Unmarried persons** (single/widowed) are requested to always submit an **up-to-date official civil status certificate**. The **civil status certificate** and **official certification must not be older than six months** at the time of payout.

If we have not received any transfer information from you after six months from the termination date, we will, based on Art. 4 (2) of the Vested Benefits Act (FZG), transfer your vested benefits to the following foundation (applies exclusively in the case of vested benefits, i.e. if no retirement benefits are due):

BVG contingency fund
Vested benefits accounts
Mailbox
8050 Zurich

Full details can be found in the following information sheets at www.profond.ch/downloads:

- Information sheet for departing insured persons
- Information sheet "Cash payment of vested benefits"