

**Occupational pension plan
Retirement
Application for payment of retirement
benefits as a lump sum**

Company _____

Contract no.* _____ Insured person no.* _____

* Fields can be completed by Allianz Suisse Life

Insured person (-> to be completed by the Insured person)

Last name _____ First name _____

Street, no. _____ Postcode, town _____

Date of birth _____ AHV no. _____

Declaration by the insured person concerning lump sum payment of retirement benefits on retirement

The insured person declares that he or she wishes to withdraw the retirement benefits under the occupational pension plan as follows:

- 25% as a lump sum and 75% in the form of a pension** **50% as a lump sum and 50% in the form of a pension**
 100% as a lump sum

In so doing, the policyholder takes note that

- 100% or 50% of the retirement benefits can be withdrawn as a lump sum only if the insured person is not drawing a disability pension from the pension plan at the time of the application for the capital withdrawal or on the effective retirement date (statutory or early retirement); unless he/she submitted the request for a capital withdrawal prior to the onset of disability.
- 100% or 50% of the retirement benefits can be withdrawn as a lump sum only if this application has been received by Allianz Suisse by the effective retirement date (statutory or early retirement);
- this application may be revoked in writing up to effective retirement;
- instead of the full pension, he or she is entitled to payment of up to 25% of the retirement benefits as a lump sum at any time even without submitting this application;
- all entitlements are nullified upon payment of 100% of the retirement benefits as a lump sum;
- the retirement pension and child benefits for retired persons are reduced accordingly if 50% of the retirement benefits are paid out as a lump sum;
- drawing 50% of the retirement benefits in the form of a lump sum correspondingly reduces the pension and the pension for the retired person's child;
- the withdrawal in the form of a lump sum within three years of purchase is prohibited by law, this irrespective of whether the lump sum results from the most recent purchase or – where an insured person has several concurrent pension arrangements – whether the lump sum is withdrawn from one and the same pension fund or from another;
- if, nevertheless, a withdrawal is made within the exclusion period, the tax deduction claimed on purchases is subsequently annulled by the competent tax authority by setting it off against the insured person's taxable income;
- moreover, the legal provisions and regulations apply;
- the spouse or registered partner must give his or her written consent to the lump sum payment using the separate "Payment of Retirement Benefits" form, which will be sent by Allianz Suisse Life to the insured person six months prior to effective retirement.

Signatures

The undersigned confirms that the information provided is correct

(Place and date)

(Signature of insured person)

Please send this declaration to your support unit.