

Occupational benefits

Application to terminate vested benefits police G _____

Insured person

Last name _____ First name _____

Street, no. _____ Postcode, town _____

Date of birth _____ Swiss social security (AHV) no. _____

single divorced* widowed*
 married since _____ in registered partnership since _____

*applies both to marriage and to a registered partnership

Transfer of vested benefits to new employer's pension fund (obligatory if entering into a new employment relationship)

New employer _____ Street, no. _____

Policy no. _____ Postcode, town _____

Account details of the new pension fund (please enclose paying-in slip):

Pension fund _____ Postal account no. _____

Account no. _____ Name of bank _____

Clearing no. _____ Postcode, town _____

Transfer of vested benefits to a vested benefits policy held with another insurance company or to a vested benefits account

Vested benefits policy Please also enclose a confirmation from the insurance company.

Vested benefits account Please enclose an account opening application and paying-in slip from the bank.

Signature

The undersigned confirms that the Information provided is correct

(Place and date)

(Signature of insured person)



Please only fill in the reverse page if you are applying for your vested benefits to be paid out in cash (exceptional case)

Application for cash payment of vested benefits

I am applying for my entire vested benefits to be paid out in cash because:

- I am permanently leaving the European Economic Area (EU/EFTA);
(please enclose official notice of deregistration from your community of residence)
- I am becoming **self-employed as a primary occupation*** and am therefore no longer subject to obligatory occupational pension insurance;
(please enclose a copy of the confirmation form the AHV Compensation Office)
- I am receiving a full disability pension;
(please enclose a copy of the ruling from the Swiss Federal Disability Insurance office)
- I will reach standard retirement age under Swiss Federal Old Age and Survivors' Insurance legislation (AHV) in five years or less

* Self-employed activity as a primary occupation,

- If no other employment activity is carried out;
- If another employment activity is also carried out, where the income and workload are less than for the declared self-employed activity.

I am applying for the elective portion of my vested benefits to be paid out in cash, and for the compulsory portion to be used to open a vested benefits policy with Allianz Suisse because:

- I am leaving Switzerland and the Principality of Liechtenstein to live in an EU/EFTA country;
(please enclose official notice of deregistration from your community of residence)
- As a cross-border commuter. I am giving up my employment in Switzerland or the Principality of Liechtenstein;
[please enclose a confirmation form the immigration police (*Fremdenpolizei*)

Account details for cash payment

(→ please enclose a paying-in slip)

Postal account no.	_____	Account holder	_____
Account no.	_____	Name of bank	_____
Clearing no.	_____	Postcode, town	_____
		IBAN and BIC	_____

Signatures

The undersigned confirms that the Information provided is correct

(Place and date)

(Signature of insured person)

The undersigned confirms his/her consent

(Place and date)

(Signature of spouse or registered partner)

(Place and date)

(Signature of pledge holder if vested benefits have been pledged for home ownership purposes)

When applying for your vested benefits to be paid out in cash, please enclose:

- The enclosures mentioned above
- A paying-slip
- Confirmation of your place of residence
- A current official confirmation of your marital status (if you are single, divorced or widowed)
- A copy of a valid official document, e.g. passport or identity card, of your spouse or registered partner (if you are married or in a registered partnership). For lump-sum payments of CHF 30,000.00 or more, the signature of your spouse or partner must be authenticated, or your spouse or partner must sign this document at an Allianz Suisse agency and present an official form of ID.

Please note

- A charge is levied on termination of the vested benefits policy. For termination of a vested benefits policy within two years, the charge is CHF 120, and CHF 80 thereafter. The lump sum charge is debited from the actuarial reserve. No charge is levied if the policy is terminated as a result of insurance benefits becoming due.
- As of 1 June 2007, if an insured person leaves the collective foundation and leaves Switzerland or the Principality of Liechtenstein permanently to live in an EU/EFTA country, the compulsory portion (BVG part) of his/her departure benefits is paid into a vested benefit policy, provided he/she is subject to obligatory social security in the new country of residence. The insured person cannot withdraw this compulsory portion in cash until five years or less before reaching standard retirement age under Swiss Federal Old Age and Survivor's Insurance legislation (AHV). The insured person is still able to submit an application for cash payment of the elective portion of the benefits, provided the conditions are met.