

OCCUPATIONAL PENSION PLAN TERMINATION NOTICE/REGISTRATION FOR CONTINUED INSURANCE (ARTICLE 47A BVG)

Company

Contract no.*

Insured person no.*

* Fields can be completed by Allianz Suisse Life

PERSONAL DETAILS

Surname

First name

Street/no.

Postcode, city

Date of birth

AHV no.

Single

Divorced¹Widowed¹

Married since

In registered partnership since

Termination date

Date on which the legal contract of employment terminates

Is the person fully fit for work at the time of his or her departure?

Yes

No²If **No**, due to

Illness

Accident

Maternity (maternity leave)

Illness related to pregnancy

Level of unfitness for work (%)

Unfit for work since

REGISTRATION FOR CONTINUED INSURANCE (ARTICLE 47A BVG) → to be completed by the insured person, if requested

Possible for people who leave their compulsory insurance scheme after reaching the age of 58 because their employment relationship has been terminated by their employer (please enclose proof) and who are not joining a new pension fund. If the registration does not reach your pension fund by 30 days after the termination of your employment relationship at the latest, continued insurance is no longer possible. In continued insurance, the insured person must finance the entire annual contribution (employer and employee share) himself/herself. Please tick the relevant box to indicate which kind of continued insurance you would like to have:

Savings and risk insurance

Risk insurance only

© See the information sheet «Continued insurance after the age of 58 following termination of the employment relationship (Article 47a BVG)» at www.allianz.ch/bvg-insureds and the Annex to the Pension Rules at www.allianz.ch/bvg-documents for more information.

DETAILS ON RETENTION OF PENSION COVER → to be completed by the departing person or by the employer

Transfer of vested benefits to new employer's pension plan:

→ obligatory if entering into a new employment relationship

New employer

Street/no.

Contract no.

Postcode, city

New employer's pension plan (please enclose paying-in slip):

Pension plan

Postgiro account no.

Name of bank, postcode, place

Bank account no. or IBAN and BIC

RETENTION OF PENSION COVER IN A DIFFERENT FORM → if the person terminating membership is not entering into a new employment relationship but wishes to retain pension cover

The departure benefits should be transferred to the following individually selected vested benefits institution

please enclose the application and paying-in slip

Name/address of the vested benefits institution

If we are not notified of a new vested benefits institution, we will transfer the departure benefits to the BVG Substitute Occupational Benefit Institution (Stiftung Auffangeinrichtung BVG) at the earliest six months and at the latest two years after the employee's departure.

SIGNATURES → The undersigned confirms that the above information is correct and complete.

Place and date

Signature of departing employee/employee
wishing to continue his/her insurance)

Place and date

Stamp/signature of employer or foundation

¹ applies mutatis mutandis to a conjugal union as well as a registered partnership

² If the case has not been reported yet, please complete the form entitled «Reporting incapacity or inability to work», sign it and return it to us.

APPLICATION FOR CASH PAYMENT → to be completed by the departing person

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Have you made tax-privileged buy-ins to the pension plan within the past three years?

Yes

No

Date

Amount (CHF)

I hereby request cash payment of the full vested benefits:

Because I am moving from the economic area of Switzerland and the Principality of Liechtenstein to an EU or EFTA country and belong to no obligatory social security scheme; (please enclose official deregistration from your municipality of residence and the LOB Guarantee Fund Liaison Office's application form (www.verbindungsstelle.ch))

Because I am definitively leaving the European economic area (EU or EFTA);
(please enclose official deregistration from your municipality of residence)

Because I am becoming **self-employed as a primary occupation*** and am therefore no longer subject to the obligatory occupational pension scheme; (please enclose copy of confirmation from the AHV Compensation Office)

Because the vested benefits are less than a full-year contribution (employee's contribution).
(the annual amount is indicated on your personal statement of benefits)

* 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 request cash payment of the super-mandatory portion of the departure benefits. For the obligatory portion I request that the pension cover be maintained in another form, in accordance with the information on page 1:

Because I am moving from the economic area of Switzerland and the Principality of Liechtenstein to an EU or EFTA country and belong to the obligatory social security scheme in that country; (please enclose official deregistration from your municipality of residence)

Because, as a cross-border commuter, I am giving up my employment in the economic area of Switzerland and the Principality of Liechtenstein; (please enclose confirmation from the Aliens' Registration Office)

ADDRESS FOR TRANSFER OF CASH PAYMENT → Please include paying-in slip

Postgiro account no.

Account holder

Bank account no.

Name of bank

Clearing no.

Postcode, city

IBAN and BIC

SIGNATURES FOR CASH PAYMENT

→ The undersigned confirms that the above information is correct and complete.

Place and date

Signature of departing person

The undersigned agrees/agree to the cash payment

Place and date

Signature of spouse or partner in a registered partnership

Place and date

Signature of the pledgee; if benefits are pledge for home ownership

NOTE

- Withdrawal of a lump sum is not permitted within 3 years of purchase. From the taxation point of view, it is irrelevant 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.
- If daily benefits are paid for unemployment in Switzerland, the departing person is entitled to the minimum occupational pension plan benefits in the event of death or disability.
The full occupational pension plan benefits can be insured under the National Substitute Pension Plan.
- If a departing person leaves the collective foundation and leaves Switzerland (incl. Liechtenstein) for good in order to take up residence in an EU or EFTA country, the mandatory occupational pension plan component of his or her termination benefit is paid into a vested benefit policy provided he or she is subject to obligatory social security contributions in the new country of residence; the departing person cannot withdraw these funds in cash until five years or less before statutory retirement under the AHV. He or she may still request cash payment of the super-mandatory component provided the relevant requirements are met.

ENCLOSURES FOR CASH PAYMENT

– Aforementioned enclosures

– A current official certification of marital status for single, divorced* and widowed* persons.

– Copy of a valid official document e.g. passport or identity card of the spouse*. For capital payments of CHF 30,000 or more, the signature of the spouse* must be officially authenticated or the form must be signed at an Allianz Suisse agency accompanied by the official documents.

* applies mutatis mutandis to a conjugal union as well as a registered partnership

Please send this declaration to your support unit.

