

OCCUPATIONAL PENSION PLAN

Retirement – payment of retirement benefits

Company

Contract no.*

Insured person no.*

*Fields can be completed by Allianz Suisse Life

INSURED PERSON (to be completed by the insured person)

Surname

First name

Street, no.

Postcode, town

Date of birth

AHV no.

Single

Married

In registered partnership

Divorced*

Widowed*

*Categories apply to both marriages and registered partnerships.

Full retirement

Partial retirement of % Precondition: reduction of employment and salary

Reduced future salary in CHF

Have you made tax-privileged purchases of retirement benefits under the pension plan within the past three years?

Yes No

Date

Amount in CHF

FORM OF RETIREMENT BENEFITS

You would like to draw the retirement benefits on _____ (retirement date)
under the occupational pension plan as follows:

100% in the form of a pension (full retirement pension)

100% as a lump sum

% as a pension

or amount in CHF

as a lump sum (remainder as a pension)

Please note that the Pension Rules of the Collective Foundation for Supplementary Occupational Benefits of Allianz Suisse Life Insurance Company only provide for payment of the retirement benefits as a lump sum.

PAYMENT DETAILS

Account holder

Postal account no.

Name of bank

Bank account no.

Branch/location

Clearing no.

IBAN and BIC

RETIRED PERSON'S CHILD'S PENSION (complete only if at least part of the retirement benefits will be drawn in the form of a pension)

Please answer this section if the insured person has children under the age of 18 or between 18 and 25 who are in education or disabled. (Enclose copy of the family booklet)

Surname, first name

Date of birth

In education until

(if children have reached the age of 18 and are still in basic education, please enclose confirmation of education status)

Disabled since

(if children have at least a 40% level of disability, please enclose a copy of the current disability ruling ("IV-Verfügung"))

DECLARATION CONCERNING PAYMENT OF RETIREMENT BENEFITS AS A LUMP SUM ON RETIREMENT

You acknowledge

- that you can only draw your retirement benefits as a lump sum if this declaration is received by Allianz Suisse Life before your effective retirement (normal or early retirement)
- that you may revoke this declaration in writing prior to your effective retirement
- that drawing all your retirement benefits as a lump sum will settle all of your entitlements
- that drawing part of your retirement benefits as a lump sum will result in a reduction to the retirement pension, the retired person's child's pension and the survivors' benefits
- that lump-sum payment is not permitted within three years of a purchase and that, for tax purposes, this applies irrespective of whether the lump sum originates from the last purchase and – if an insured person has multiple simultaneous pension relationships – irrespective of whether the lump sum is drawn from the same or a different pension foundation
- that if a lump sum is nonetheless drawn during the blocking period, the responsible tax authority may retroactively rescind any tax deduction claimed for purchases by offsetting it against the insured person's taxable income
- that the provisions of the Pension Rules and the law shall otherwise apply
- that your spouse or registered partner must agree to the lump-sum payment in writing
- that full or partial lump-sum payments may only be taken for a maximum of two retirement steps

SIGNATURES

Signature of the insured person:

Signature of the spouse/registered partner
(for lump-sum payment):

(Place and date)

(Place and date)

(Signature)

(Signature)

The pledgee (promotion of home ownership using funds from occupational pensions) hereby agrees to payment of the retirement benefits as indicated above (for lump-sum payment):

(Place and date)

(Signature)

The following documents must be enclosed with the completed and signed form when applying to have retirement benefits paid out as a lump sum:

- 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 or registered partner.
- For lump-sum payments of CHF 30,000 or more, the signature of the spouse or partner must be officially authenticated or the form must be signed at an Allianz Suisse agency in the presence of the official documents.

Please send this declaration to your support unit.