

## Occupational pension plan Retirement – payment of retirement benefits

Company	Contract no. *	Insured person no. *
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\* Fields can be completed by Allianz Suisse Life Insurance Company

### Insured person

To be completed by the insured person.

Surname	First name
Street, no.	Postcode, town
Date of birth	AHV no.

Marital status

Single
  Married
  In registered partnership
  Divorced \*
  Widowed \*

\* Categories apply to both marriages and registered partnerships.

Full retirement

Partial retirement

Precondition: the proportion of retirement benefits drawn must not exceed the proportion of the salary reduction.

For the first partial retirement step, the salary reduction and the proportion of retirement benefits drawn must be at least 20%.

Proportion of retirement benefits drawn in %	Reduced future salary in CHF
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Have you made tax-privileged purchases of retirement benefits under the pension plan within the past three years?

Yes  No

Date	Amount in CHF
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### Form of retirement benefits

You would like to draw the retirement benefits under the occupational pension plan as follows:

On (retirement date) \_\_\_\_\_

100% as a pension
  100% as a lump sum

\_\_\_\_\_ % as a pension

or amount in CHF \_\_\_\_\_ as a lump sum (remainder as a pension)

Have you drawn lump-sum benefits in another pension fund of your employer?

Yes  No

Number of withdrawals	Years in which withdrawals were made
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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	Name of bank
Branch / location	Postal account no.
Bank account no.	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 you have children who are under 18 or who are between 18 and 25 and in education or disabled (enclose copy of the family booklet).

**Child 1**

Surname, first name	Date of birth
In education until	Disabled since
If the child is aged 18 or over and is still in basic education, please enclose confirmation of education status.	If the child is at least 40% disabled, please enclose a copy of the current disability ruling ("IV-Verfügung").

**Child 2**

Surname, first name	Date of birth
In education until	Disabled since
If the child is aged 18 or over and is still in basic education, please enclose confirmation of education status.	If the child is at least 40% disabled, please enclose a copy of the current disability ruling ("IV-Verfügung").

**Child 3**

Surname, first name	Date of birth
In education until	Disabled since
If the child is aged 18 or over and is still in basic education, please enclose confirmation of education status.	If the child is at least 40% disabled, 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 three retirement steps

**Data protection**

Information on data protection, in particular on the uses and recipients of your data and on your rights, can be found in our data protection statement at [allianz.ch/privacy-policy](http://allianz.ch/privacy-policy).



**Signatures**

Place and date	Signature of the insured person
Place and date	Signature of the spouse / registered partner (for lump-sum payment)

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.