

Payment of termination benefit in cash

Information about contract and insured person

Zurich is obliged to check whether the prerequisites exist for payment in cash

Name of employer or foundation

Contract no.

Last name of insured person

First name

Street/road, no.

ZIP code, town/city (country) etc.

AHV no. of the insured person

Marital status

- Single
 Married
 Divorced
 Widowed
 In a registered partnership
 Dissolved partnership

Private telephone number

Business telephone number

Reasons for a cash payment

- You are becoming self-employed in your main occupation in Switzerland.
 Proof: Confirmation from AHV compensation office, indicating date of admission to the scheme.

- You are leaving Switzerland/Liechtenstein permanently.

- You are moving to an EU/EFTA country or will no longer be working in Switzerland as a cross-border commuter. You can draw in cash the portion of the termination benefit in excess of the obligatory benefit. The necessary application form for cash payment of the obligatory component can be obtained from the security fund.

Country of immigration

Proof:

- Confirmation of deregistration from the municipal authority for your place of residence and any other proof.
- Confirmation from the BVG security fund. Office address: P.O. Box 1023, 3000 Berne 14 (Tel. 031 380 79 71 or www.verbindungsstelle.ch).

- You are moving to a third country that does not belong to the EU or the EFTA.
 You may have the full termination benefit paid out to you.

Country of immigration

Proof: Confirmation of deregistration from the municipal authority for your place of residence.

- The termination benefits are less than 1 year's contribution by the insured person.

Confirmation regarding any purchases of additional benefits

The benefits resulting from purchases may not be paid out as a lump-sum distribution for the following three years.

We shall therefore transfer the benefits from purchases made during the past three years to a vested benefits plan. If for this reason the entire vested benefit savings are not paid out in cash, we recommend that you clarify any possible tax disadvantages that may apply with the responsible tax office prior to the cash payment.

Did you make any second-pillar purchase(s) (Art. 79b BVG) in the last three years prior to leaving your employment?

- Yes

If so:	With which pension scheme did you make that purchase?	Date	Amount
1.			
2.			
3.			

- No, I haven't made any purchase in the last three years.

Information about contract and insured person (if not shown on the front of this form)

Contract no.

AHV no. of the insured person

Last name and first name of the insured person

Use of vested benefits

Please pay the portion in excess of the obligatory benefit or the entire termination benefit into my personal account:
(less any purchases made in the last three years)

For postal payment: Postal account no.

In the case of bank payments: IBAN no.

For postal and bank payments: Account in the name of

Name and address of the bank

If you are moving to an EU/EFTA country:

- The obligatory component of the termination benefit will be transferred to the UBS Vested Benefits Foundation (UBS Freizügigkeitsstiftung), PO Box 4002, Basel (Tel. 061 266 75 75) (and/or the benefit from any purchases that you have made in the last three years).

or:

- The obligatory component of the termination benefit is to be transferred to the following vested benefits foundation:
(and/or the benefit from any purchases that you have made in the last three years)

Name and address of the vested benefits institution

For postal payment: Postal account no.

In the case of bank payments: IBAN no.

For postal and bank payments: Account in the name of

Name and address of the bank

Once you have received confirmation regarding your insurance obligation, you can apply to your vested benefits foundation to make use of your termination benefit.

Confirmation by insured person

Place

Date

Day

Month

Year

Signature

Approval of spouse or registered partner in case of cash payment

If you are not married or you are not living in a registered partnership (marital status: single, divorced, unmarried, widowed or dissolved partnership), we request you to append a current certificate of marital status from your place of citizenship (for Swiss citizens) or a current certification of marital status or domicile (for foreigners).

For claimants who are married or are living in a registered partnership, the written consent of the spouse is required for the cash payment, as per Art. 5 para. 2 of the FZG [Vested Benefits Act].

Place

Date

Day

Month

Year

Signature *

* If the cash payment is more than CHF 50 000, the authenticity of the signature of your spouse or partner must be officially attested by a notary or an official of your community, on presentation of the passport, identity card or residence permit. The costs of obtaining the documents required for the cash payment and the attestations shall be paid by the insured person.