



## Application for cash payment / transfer

**Employer****Contract no.****Insured person** Mr  Ms

Surname

First name

Street

Postcode, Place

Telephone (private)

E-Mail (private)

Date of birth

Insured no.

Marital status

Date of marriage

**Transfer to new pension scheme (pension fund, vested benefits foundation)**

Please enclose a payment slip from the new pension scheme.

New employer

Postcode, Place

New pension scheme

Contract no.

Bank

Account no. / IBAN

 Opening an account at the Tellco Vested Benefits Foundation**Cash payment of vested benefits****Reason for payment****Required documents** I am leaving Switzerland / Principality of Liechtenstein  
definitively and moving my residence to

Confirmation of departure from the most recent Swiss municipality of residence (not older than 6 months) or current certificate of residence

The residence is located  in an EU / EFTA state\* outside an EU / EFTA state

Please enclose official confirmation of departure.

 Self-employed activity as primary occupation

- OASI funding confirmation with declared OASI gross annual income including copy of application for OASI
- Copy of passport/ID of spouse/partner with legible signature
- Self-employment may not have started longer than one year ago.

 Vested benefits amount to less than one annual contribution of the insured person Reaching the statutory retirement age

(no earlier than 7 years prior to this and no later than 5 years afterwards)

 Death of the insured

To be proven by the beneficiaries by submitting a death certificate, certificate of inheritance and family certificate

**Regulations according to marital status****Required documents**

– Married or registered partnership

Written consent of spouse / partner

– Divorced persons or persons whose partnership has been legally dissolved

Copy of divorce decree  
Official certificate of marital status (not older than 1 month)

– Persons who are single or who live in an unregistered partnership or widowed persons

Official certificate of marital status (not older than 1 month)

**The insured declares:**

that he / she has not purchased any additional benefits from an occupational pension fund in the last 3 years

that he / she has purchased additional benefits from an occupational pension fund

**Banking details**

Please enclose a payment slip.

Bank / Post

Postcode, Place

Account no.

IBAN

**Signature / s**

Place, Date

Insured person

I agree to the cash payment.

Spouse or registered partner

For amounts up to CHF 10,000 we need copies of the spouse / partner passport or identity document.

Official certification of signature of the spouse / partner (for cash payments) for amounts exceeding CHF 10,000

(Justice of the peace, notary public or municipality of residence)

\* If you are leaving Switzerland definitively and moving your residence to a EU/EFTA country or are a frontier worker residing in a EU/EFTA country and are definitively giving up your occupation in Switzerland, since 1 June 2007 you can only request cash payment of the part of your vested benefits which is above the obligatory level, if a duty to contribute to a mandatory state insurance scheme exists for you at the new place of establishment (frontier worker: at the previous domicile). The obligatory part of the vested benefits is to be invested in a vested interests account in Switzerland. You can clarify whether a duty to contribute to a mandatory state insurance scheme exists for you by using the appropriate form at [www.verbindungsstelle.ch](http://www.verbindungsstelle.ch).