



tellico

Pension solutions. Banking. Real estate.

Tellico Pension Solutions 3a

Bahnhofstrasse 4 t +41 58 442 65 00
Postfach 713 vorsorge3a@tellico.ch
CH-6431 Schwyz tellico.ch

Application for cash payment/transfer

Account no.

The Insured

Mr Ms

Surname	<input type="text"/>	First name	<input type="text"/>
Street	<input type="text"/>	Postcode, Place	<input type="text"/>
Telephone	<input type="text"/>	E-Mail	<input type="text"/>
Date of birth	<input type="text"/>	OASI No.	<input type="text"/>
Marital status	<input type="text"/>	Date of marriage	<input type="text"/>

Reimbursement to a new pension fund (pillar 3a/buy-in into pension fund)

Please enclose a payment slip from the new pension scheme.

Pension fund	<input type="text"/>	Postcode, Place	<input type="text"/>
Bank/Swiss Post	<input type="text"/>	Contract no.	<input type="text"/>
Account no./IBAN	<input type="text"/>		

Cash disbursement of pension assets

Third pillar retirement funds may be used to buy into the pension fund if there are gaps in the pension fund. (Please enclose confirmation of pension fund pension gap.)

Reason for payment

Required documents

<input type="checkbox"/> Permanent departure from Switzerland or the Principality of Liechtenstein	Confirmation of de-registration from the last municipality of residence (no older than six months), otherwise current certificate of residence, copy of passport
<input type="checkbox"/> Self-employment	Recent confirmation from the OASI compensation office that the insured has taken up self-employment as their primary source of income , or a copy of the most recent OASI funding confirmation with declared OASI gross income, not older than one year
<input type="checkbox"/> Reaching statutory retirement age (five years before at the earliest, five years after at the latest)	If domiciled abroad: current certificate of residence
<input type="checkbox"/> Death of the insured	To be proven by the beneficiaries by submitting a death certificate, certificate of inheritance and family certificate
<input type="checkbox"/> Receipt of a full disability pension from the Federal invalidity insurance	Copy of current pension ruling from the Federal invalidity insurance



tellco

Pension solutions. Banking. Real estate.

Tellco Pension Solutions 3a

Bahnhofstrasse 4 t +41 58 442 65 00
Postfach 713 vorsorge3a@tellco.ch
CH-6431 Schwyz tellco.ch

Application for cash payment/transfer

Provisions according to civil status

- Married or registered partnerships
- Divorced or court-dissolved partnerships
- For unmarried persons or unregistered partnerships

Required documents

- Written agreement of the spouse or partner, and official certification of both signatures
- Copy of divorce agreement, dissolution by court order
- Official confirmation of civil status (no older than one 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 as confirmed by the enclosed certificate (enclose certificate)

Banking details

Please enclose a payment slip.

Bank/Post Office Postcode, Place
Account no. IBAN
(for payments abroad)

Signature / s

Place, Date The Insured

I agree to the cash payment.
Spouse or registered partner

- Official certification of both signatures (for cash disbursement)

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