

Address of the previous 3a-pillar scheme

Details of pension plan member (customer)

Name _____ First name _____
Street, no. _____
Postcode _____ Location _____
Date of birth _____ Marital status _____

Order to current pillar 3a scheme

Retirement savings account number and name of the previous 3a-pillar scheme:

Transfer and close account

I hereby instruct you to transfer my retirement assets in the above retirement savings account to my retirement savings account 3a mentioned below held with the PostFinance Retirement Savings Foundation 3a. I acknowledge that any securities will be sold.

Transfer to postal account 30-765432-7 / IBAN CH13 0900 0000 3076 5432 7
PostFinance Retirement Savings Foundation 3a
P.O. Box
4002 Basel

Retirement account number at the PostFinance Retirement Savings Foundation 3a (mandatory)

Confirmation of the PostFinance Retirement Savings Foundation 3a

The PostFinance Retirement Savings Foundation 3a hereby confirms that the above-mentioned account is a retirement account 3a in accordance with the statutory provisions of the fixed pension plan (pillar 3a).

Location _____ Date _____

Signature of pension fund member _____

Please send to your previous pillar 3a scheme.