

# Retirement savings account 3a transfer order to pension fund or retirement savings foundation

Please use block capitals. All references to persons apply to both genders.

## Account holder

### Retirement savings account no.

|                               |       |            |       |
|-------------------------------|-------|------------|-------|
| Last name                     | _____ | First name | _____ |
| Street                        | _____ | No.        | _____ |
| Postcode                      | _____ | Location   | _____ |
| Date of birth<br>(dd.mm.yyyy) | _____ | Telephone  | _____ |

## Reason for transfer (specifying the documents that must be submitted)

On receipt, the processing time may be up to 10 working days. The documents submitted will not be returned. Copies are accepted.

If the retirement assets are pledged, the pledgee (e.g., the bank) must cancel the pledge (pledge release). A copy of the pledge release must be submitted.

**Transfer to a pillar 3a foundation**

Name of the pillar 3a foundation \_\_\_\_\_

- Account opening confirmation of the new pillar 3a foundation
- Payment slip / bank details of the new pension fund foundation

**Transfer to a pension scheme (2nd pillar)**

Notice: If, according to the pension fund statement, the existing pillar 3a assets are smaller than the maximum permitted purchase amount, the total assets will always be transferred to the pension scheme.

- Current confirmation of maximum permitted purchase
- Payment slip / bank details of the pension scheme

**Divorce / Legally dissolved partnership**

- Legally binding divorce decree / dissolution judgment recognized and enforced by a Swiss court
- Account opening confirmation and payment slip / bank details of the former spouse's or partner's pillar 3a foundation

**Voluntary cession in accordance with the divorce decree**

- Legally binding divorce decree / dissolution judgment recognized and enforced by a Swiss court
- Account opening confirmation and payment slip / bank details of the former spouse's or partner's pillar 3a foundation
- Copy of ID of former spouse or partner

Amount in CHF \_\_\_\_\_

Signature of former spouse or partner \_\_\_\_\_

**Assignment to spouse / registered partner as a result of change in the matrimonial property regime**

- Certified matrimonial property contract
- Account opening confirmation and payment slip / bank details of the spouse's or partner's pillar 3a foundation

**Payment instructions**

Name of bank \_\_\_\_\_  
IBAN \_\_\_\_\_  
In the name of \_\_\_\_\_

**PF Pension retirement fund**

Shares in the PF Pension retirement fund will be sold in the required amount on the disbursement date. If the securities investments are to be sold immediately, i.e. before the disbursement date, please submit a separate fund order.

**Signature**

The pension account holder

- confirms hereby that the application and the documentation provided are correct and complete;
- authorizes the PostFinance Retirement Foundation 3a to make any other inquiries that may be necessary.

Location \_\_\_\_\_ Date \_\_\_\_\_

Signature of pension account holder \_\_\_\_\_

**Please send the form to:**  
PostFinance Retirement Savings Foundation 3a  
P.O. Box  
CH-4002 Basel

**Please leave empty**

Date \_\_\_\_\_ Customer advisor \_\_\_\_\_