

Pension agreement and application to open a retirement savings account 3a

PostFinance Retirement Savings Foundation 3a Retirement savings account no. _____

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

Account holder

Mr Ms

Name _____

First name _____

Street, no. _____

Postcode _____ Location _____

Date of birth _____

Marital status _____

Nationality CH stateless other _____

Country _____

Language of correspondence G F I E

Telephone (home) _____

Mobile phone _____

I am a member of a pension fund (2nd pillar)¹ yes no

¹ Mandatory information

Please activate the retirement savings account 3a for my e-finance number _____

(Confirmation of agreement, account statement and order documents can be downloaded in e-finance)

Private account PostFinance _____ (for crediting to customer assets)

Address for correspondence

Please send all correspondence to the pension fund member's address to the following address:

Name _____

First name _____

Street, no. _____

P.O. Box _____

Postcode _____ Location _____

Country _____

Standing order

I hereby instruct PostFinance Ltd to set up a standing order in favour of the requested retirement savings account 3a.

Debit account at PostFinance _____

Amount in CHF _____

Last name Account holder _____

First name Account holder _____

Execute for the first time on _____

for the last time on _____ (dd.mm.yy)

until revoked

monthly quarterly semi-annually annually

If the execution date falls on a Saturday, a Sunday or a general holiday, the order will be executed on the next working day.



Signature of pension fund member

Financial Services Act

Information on the implementation of the Financial Services Act (including PostFinance's licence and the contact details of the supervisory authority and the ombudsman conciliation office) is available at postfinance.ch/finsa.

Foundation regulations

The relationship between the pension plan member and/or his survivors and the Foundation is governed by the provisions of the Foundation's regulations. By signing this agreement, the pension fund member confirms that he has been made aware of the regulations of the PostFinance Retirement Savings Foundation 3a and acknowledges them to be binding.

Data protection

Information about how the foundation processes your personal data can be found in the Privacy Policy for PostFinance Retirement Savings Foundation 3a at www.postfinance.ch/dps-3a. PostFinance may also use your personal data for marketing and customer care purposes. Information on this can be found in the General Privacy Policy at www.postfinance.ch/dps.


Identification

If your identity has not yet been verified by PostFinance, please take this pension agreement and valid legal proof of identity (passport, identity card) to a post office or to a PostFinance branch to have an identity check carried out.

Location	_____				
Date	_____	Signature of pension fund member	_____		

Please send the form to: PostFinance Ltd, Scan Center, 3002 Berne

Please leave empty

Concluding office	_____	_____	
	Locality code	Staff number	Date stamp

