

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.