

Vested benefits when changing jobs

You have recently joined Vita. If you have pension fund assets, you will have to transfer them to Vita from your old pension plan or vested benefits institution as soon as possible.

1

What to do

1. Your previous pension plan/vested benefits institution needs the following information for the transfer:

Last name
First name
AHV number
Date of birth
New employer
Contract number

Note

You can obtain the contract number from your new employer.

2. Check the Vita Joint Foundations' pension plan where you are newly insured:
 - Vita Classic (contract number formatted with forward slash, e. g. 12'345 / 000):**
UBS AG, 8098 Zurich – in favor of CH23 0023 0230 3016 4201 M,
Vita Joint Foundation, 8050 Zurich – account 80-2-2
 - Vita Classic (contract number formatted without forward slash, e. g. 12'345'678):**
UBS AG, 8098 Zurich – in favor of CH18 0023 0230 3016 4202 C,
Vita Joint Foundation, 8050 Zurich – account 80-2-2
 - Vita Plus (format of the contract number with a forward slash, e. g. 12,345 / 000):**
UBS AG, 8098 Zurich – in favor of CH34 0023 0230 P059 0000 0,
Zurich Life Insurance Company Ltd, 8045 Zurich – account 80-2-2
 - Vita Plus (format of the contract number without a forward slash, e. g. 12,345,678):**
UBS Ltd., 8098 Zurich – in favor of CH80 0023 0230 EW10 1930 8,
Zurich Life Insurance Company Ltd, 8045 Zurich – account 80-2-2
3. Send this form to your previous pension plan/vested benefits institution so that your departure payment can be transferred to the above account.
4. If you do not know where to obtain the departure payment from your previous employer, contact the 2nd pillar central office (www.verbindungsstelle.ch).

Note

Please contact the occupational retirement provision coordinator at your company or call our Help Point BVG at 0800 80 80 80 if you are insured with **Vita Invest**, **Vita InvestPlus** or **Vita Select**. We will be happy to explain what to do and to send you a personal deposit slip.



Departure payment / vested benefit

The departure payment (also vested benefit) is equal to your pension assets at the time of departure and consists of the employee's and employer's savings contributions, any personal voluntary contributions, contributed vested benefits and accumulated interest. When you start a new job, your pension assets must be transferred to your new employer's pension plan.

2 What happens next?

Please send the fully completed form to your previous pension plan/vested benefits institution. It will transfer your departure payment to Vita. As soon as we receive your departure payment, we will send you a new pension certificate.



Do you have any questions about this form?

Help Point BVG (phone 0800 80 80 80) is available to answer your questions from 8 a.m. to 6 p.m. from Monday to Friday.