

Departure from the employee pension plan

Employees are entitled to a departure payment when they leave the company. Please use this form to notify us of the employee's departure.

1 Information about the contract and your member of staff

To identify you we need at least one of the following three pieces of information:

Name of employer

Contract number

AHV number of your member of staff

We need all the following information about your member of staff:

Last name

First name

Street, no.

Zip code, town or city, country

Home phone number

Email

Marital status
 single married divorced widowed registered partnership
 dissolved partnership

Deadline

Send this form to us no later than on the employee's last day with the company.

Note

Your **contract number** can be found on your pension plan or on your pension certificate.

2 Departure details

Departure date

The employee is retiring early.*

 *** Documents required**
 Form «Notification of early retirement or semi-retirement»

Note

The departure date is always the last day of employment, which is generally the last day of the month. Do not deduct leave entitlements.

3

Details regarding capacity to work

Is the departing person healthy / able to work as of the date of departure?

No | Yes

4

Use of departure payment

Your employee will be joining a new pension plan.

No | Yes

Your employee will not be joining a new pension plan and requests an application to open a vested benefits account with Zurich vesting foundation.

No | Yes

Your employee will not be joining a new pension plan and asks for the funds to be transferred to the following vested benefits institution at a bank or insurance company.

No | Yes

Your employee wishes to receive the funds in cash.

No | Yes*



* Documents required

The required documentation, along with the «Cash payment of the departure payment» form, must be submitted by your employee.

We are not aware of the use of the termination benefit.

→ Please obtain information directly from the employee.

5

Name and address of the bank or pension or vested benefits institution:

The termination benefit must be transferred as follows:

Name and address of pension or vested benefits institutions

Other information (e.g. new employer):

Account held by:

IBAN no.



A Zurich vested benefits account is suitable in the following cases

You break off your employment in the medium to long term, for example for:

- A stay abroad
- Further education
- Self-employment

You can find more information at zurich.ch/fzk

Note

Employees aged 58 or older who **are not starting or looking for a new job** will automatically enter early retirement.

We will transfer employees' departure payments to a vested benefits institution or to their new pension plan if they are aged 58 or older and **are looking for or starting a new job**.

6 Confirmation by employer

The employer confirms that they have properly reported all changes in personal data (e.g. changes in salary or marital status). Personal data cannot be changed once the statement has been generated.

Place and date	Signature of the employer
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7 Confirmation by employee

(Is needed when opening a vested benefits account or for cash withdrawal)

Place and date	Signature of the insured person
	First name, last name

8 What happens next?

You will receive the new contribution statement as soon as we have received and reviewed your departure notification from the occupational pension plan. We will also transfer the departure payment and send your employee a final benefits statement.

Please send the completed and signed form by regular mail or email to:

Zurich Insurance Company Ltd
Help Point BVG
P. O. Box
8085 Zurich
bvg@zurich.ch



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.