

How to request payment of the termination benefit

1.

Check which of the following applies to you:

Your termination benefit is lower than your annual contribution.

If you were only in the occupational retirement provision scheme with Vita for a short period of time, your termination benefit may be less than your annual contribution. In this case, you may have the full termination benefit paid out to you. You can find out the amount of your annual contribution from your last pension certificate.

You are becoming self-employed with a sole proprietor company as your main occupation in Switzerland.

You can have your entire termination benefit paid out.

You are definitely emigrating to a country that does not belong to the EU/EFTA.

You are definitely emigrating to country belonging to the EU/EFTA.

You can be paid the **super-mandatory part** of your termination benefit.

You are a cross-border commuter and are definitively giving up your job in Switzerland.

You can also draw the **mandatory part** if **you are not** subject to mandatory state insurance for old-age, disability and survivors' benefits at your (new) place of residence.

Otherwise, we will transfer the mandatory portion of your termination benefit to a vested benefits account with a Swiss vested benefits institution.

2.

Collect all the documents specified in the checklist on the next page.

3.

Please note the following before filling out the form.

If you have made one or more purchases into pillar 2 in the three years prior to your departure, you may not have this money paid out to you. In addition, a cash payment has tax-related consequences. Please clarify the tax-related consequences directly with your responsible tax authority.

4.

Fill in the form and send it within six months of termination, together with all supporting documents.

By email to:
vitainvest@pfs.ch

By regular mail:
Vita Invest Collective Foundation of Zurich Life Insurance Company Ltd
P. O. Box, 8085 Zurich

5.

As soon as we have received the notice of termination from your employer and all your documents for the payment, we will review your application for cash payment of the termination benefit.



Do you have any questions about this form?

The Vita Invest customer service (phone 044 628 43 43) is available to answer your questions Monday through Friday from 8.00 a. m. to 12.00 noon and from 1.00 p. m. to 6.00 p. m.



You need this proof for cash payment of the termination benefit

Your termination benefit is lower than your annual contribution.

- Proof of marital status¹⁾**, if you are not married or in a dissolved partnership.

You are becoming self-employed.

- Confirmation from the AHV compensation office.**
- Proof of marital status¹⁾**, if you are not married or in a dissolved partnership.
- Copy of your passport / ID card and that of your spouse or registered partner.** The signatures must be visible. Copies of a driver's license are not sufficient.
- Certified signature of the spouse or registered partner**, if the withdrawal amount is more than CHF 50,000.

You are emigrating to a country belonging to the EU / EFTA.

- Confirmation of deregistration from the municipality.**
- Confirmation of security fund²⁾**, if you are not subject to mandatory state insurance for old-age, disability and survivors' benefits at your new place of residence.
- Proof of marital status¹⁾**, if you are not married or in a dissolved partnership.
- Copy of your passport / ID card and that of your spouse or registered partner.** The signatures must be visible. Copies of a driver's license are not sufficient.
- Certified signature of the spouse or registered partner**, if the withdrawal amount is more than CHF 50,000.

You are emigrating to a country that does not belong to the EU / EFTA.

- Confirmation of deregistration from the municipality.**
- Proof of marital status¹⁾**, if you are not married or in a dissolved partnership.
- Copy of your passport / ID card and that of your spouse or registered partner.** The signatures must be visible. Copies of a driver's license are not sufficient.
- Certified signature of the spouse or registered partner**, if the withdrawal amount is more than CHF 50,000.

You are a cross-border commuter.

- Current confirmation of residence or cancellation of the cross-border commuter permit.**
 - Confirmation of security fund²⁾**, if you are not subject to mandatory state insurance for old-age, disability and survivors' benefits at your place of residence.
 - Proof of marital status¹⁾**, if you are not married or in a dissolved partnership.
 - Copy of your passport / ID card and that of your spouse or registered partner.** The signatures must be visible. Copies of a driver's license are not sufficient.
 - Certified signature of the spouse or registered partner**, if the withdrawal amount is more than CHF 50,000.
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1) The proof of marital status may be no more than three months old. If you also require confirmation from the BVG security fund, please do not order the proof of marital status until you have received confirmation from the BVG security fund, as this takes several months.

2) Confirmation from the BVG security fund, Bern, tel. +41 31 380 79 71 or www.verbindungsstelle.ch

Application for cash payment of your termination benefit



1 Information about the contract and your person

Contract number	
Name of the employer	
Last name	First name
Street, no.	Zip code, town or city, country
Private telephone	Private email
Date of birth	Marital status <input type="radio"/> single <input type="radio"/> married <input type="radio"/> divorced <input type="radio"/> widowed <input type="radio"/> registered partnership <input type="radio"/> dissolved partnership
AHV number	

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

2 Confirmation of any purchases

Have you made one or more purchases into pillar 2 in the three years prior to your departure?

No | Yes

◀ If you have made one or more purchases into pillar 2 in the three years prior to your departure, you may not have this money paid out to you. In addition, a cash payment has tax-related consequences. Please clarify the tax-related consequences directly with your responsible tax authority.

3 Justification for the payment

Which of the following applies to you?

- My termination benefit is lower than my annual contribution.
- I am becoming self-employed for my main occupation in Switzerland.

Do you have another gainful occupation apart from this one?

No | Yes

Self-employment

Degree of occupation in %
AHV annual salary in CHF (extrapolated to one year)

Other gainful employment

Degree of occupation in %
AHV annual salary in CHF (extrapolated to one year)

I am definitively emigrating from Switzerland or I am a cross-border commuter and definitively giving up my job in Switzerland.

Which country are you emigrating to? Or, if you are a cross-border commuter, in which country do you reside?

Country

Does this country belong to the EU / EFTA?

No | Yes

Are you subject to mandatory state insurance for old-age, disability and survivors' benefits at your (new) place of residence?

No | Yes

In this case, we will transfer your mandatory termination benefit to a vested benefits institution of your choice:

Name and address of the vested benefit institution

Account held in the name of

Name and address of the bank

IBAN No.

◀ You can find out which states belong to the EU or EFTA at www.verbindungsstelle.ch.

4 Transfer

Where would you like the cash payment to be paid?

Account held in the name of

Name and address of the bank

IBAN No.

5 Signatures

Place and date

Signature

Place and date

Signature of spouse or registered partner

Does the settlement amount to more than CHF 50,000?

No | Yes

Certification of the spouse or registered partner's signature

Place and date

Notary's signature

◀ The certification must be carried out by a notary or an authenticating official. Please present your passport, ID card or foreigner's ID card: You bear the certification costs.