

Request for the transfer of vested benefits

This form is to be completed, **signed** and returned to the Fonds de Pensions Nestlé at the time of the end of employment.

Personal data

Last name First name

Member number AVS number

Date of birth End of employment date

Address

Private phone number Private e-mail address

Marital status Single Married Registered partnership
 Widowed Divorced Dissolution of registered partnership

Ability to work

Do you have full ability to work at the date of end of employment? Yes No

Has a request for a disability benefits been addressed to the Swiss Disability Insurance? Yes No

Instructions for the transfer of vested benefits



New employer in Switzerland

➔ Mandatory transfer of the vested benefits to the new pension fund

Name of the pension fund

Address

Contract nr. Name of new employer

IBAN account nr. (or attach a payment slip)

Name and address of the bank

B

No new employer - vested benefits remain in the pension circuit

→ Opening of an occupational savings account/vested benefits policy

Name of the bank or insurance company

IBAN account nr. (or attach a payment slip)

→ Please attach the opening form of the account/policy

C

No new employer in Switzerland

→ Request for cash payment of the vested benefits

- 1) I set up of a self-employed business
 - Join a recent affiliation statement from the AVS
- 2) My vested benefits amount to less than my personal annual employee's contributions (without employer's part)
 - Please take contact with our administration team to check if you fulfil this condition prior to returning the form
- 3) I permanently leave Switzerland
 - Join a departure statement from local authorities or copy of cancelled work/residence permit

New residence in :

■ an EU or EFTA country

■ a country outside the EU or EFTA

Extra-mandatory : vested benefits can be paid out

Entitlement to the refund of the total vested benefits

LOB retirement savings : this amount must remain on an occupational savings account or a vested benefits insurance policy in Switzerland

→ Also complete data under **letter B**

Under certain circumstances, the LOB retirement savings may be paid out. For any additional information or to obtain the necessary document, please contact the LOB Guarantee Fund liaison office, www.verbindungsstelle.ch

IBAN account nr.

SWIFT-BIC

Name and address of the bank

→ Join a bank confirmation or a copy of your bank card which show account holder and account number

→ If the bank is located abroad, the SWIFT-BIC information is mandatory

I certify that the information stated in this document is fully accurate

→ To allow for cash settlement (section C), the signature of the spouse as well as a copy of the passport or identity card of each signatory is compulsory.

Date and place

Signature

Date and place

Spouse's signature
