

Request for retirement benefits

v2021

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|------------------------------------|---------------------|
| Last name | First name |
| Language (French, German, English) | Private E-Mail |
| Private phone number | Mobile phone number |
| Date of retirement | AVS (OASI) number |

Options (Please tick as appropriate)

- Total retirement benefits paid as pension
- Request for lump sum payment, request form at the back
- Partial retirement of _____ %
- Utilisation of Retirement savings account C/Early retirement account, request form at the back

Additional contribution/Purchase

I will make a purchase to improve my retirement benefits. This option is only possible if no request for lump sum payment is submitted. The payment has to be imperatively made before the end of employment.

- Yes, foreseen payment date _____ amount _____
- No

Temporary annuity – AVS bridge pension (Pont AVS)

- Amount to balance the income before entitlement to Swiss social security benefits (AVS)
- For members under the pension objective plan (old plan) :
Amount at member's discretion, however should not exceed CHF 27'504 per year, respectively CHF 2'292 per month
- For members under the savings plan (new plan) :
Amount at member's discretion, however should not exceed CHF 28'680 per year, respectively CHF 2'390 per month
- Financed by the member
- Lifetime reduction of the retirement pension, respectively of the relevant survivors' pension

I apply for a temporary annuity – AVS bridge pension

- Maximum amount
- Requested monthly amount of CHF _____
- No, no temporary annuity requested

Instructions for payment of the monthly pension

Full address of tax residence at the time of retirement

Bank name and address

IBAN account number

Bank outside Switzerland - SWIFT/BIC

Place and date

Member's signature

Request for lump sum payment

Last name _____ First name _____

Date of retirement _____ AVS (OASI) number _____

Conditions for lump sum payment

- Request deadline: at least **3 months** prior to retirement date
- Request is irrevocable
- If married or in a registered partnership, spouse's agreement is compulsory
- For members under the pension objective plan (old plan):
Maximum 50% of the pension paid into a lump sum
- For members under the savings plan (new plan):
50% of the savings account under CHF 1'000'000 and 100% of the savings account over CHF 1'000'000
- Reduction of the pension and, if applicable, of the relevant survivors' pensions
- No future adjustment on the part of the pension withdrawn as lump sum
- Any benefit, paid out as lump sum or pension, is subject to tax

Lump sum payment or percentage requested CHF or % _____

Utilisation of Retirement savings account C/Early retirement account (pre-financing)

Required Option:

- Total savings of retirement savings account C/early retirement account paid as lump sum. The savings must be added to the lump sum amount or percentage stated above
- The lump sum amount or percentage stated above already includes the savings of the retirement savings account C/early retirement account
- Conversion of the savings of the retirement savings account C/early retirement account into an additional pension
- No retirement savings account C/early retirement account

Instructions for payment of the lump sum

Bank name and address _____

IBAN account number _____

Bank outside Switzerland - SWIFT/BIC _____

Place and date _____ Member's signature _____

Place and date _____ Spouse's signature (**compulsory**) _____

Please enclose a copy of the passport or identity card of each signatory