

## Request for retirement benefits

v2023

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 29'400 per year, respectively CHF 2'450 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

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Bank name and address

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IBAN account number

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Bank outside Switzerland - SWIFT/BIC

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Currency (CHF, EUR, Other)

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Place and date

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Member's signature

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## 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 \_\_\_\_\_ Currency (CHF, EUR, Other) \_\_\_\_\_

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**