

## Declaration of use of the termination benefit

After I finish my employment relationship, I will:

- Option A)** stay in Switzerland and/or either start a new Job or start my own business
- Option B)** leave Switzerland and move into a EU/EEC country: \_\_\_\_\_
- Option C)** leave Switzerland and move into a non EU/EEC country: \_\_\_\_\_

→ In case you leave the country (Option B or C), please provide an official confirmation from both countries (registration/de-registration).

### Declaration on marital status

- I am married or I live in a registered same-sex partnership
- I am not married

### Insignificance of pension fund assets

- I wish to have my pension fund assets being paid out in cash due to insignificance (assets are lower than one year's employee contribution)  
→ Please complete account detail in Appendix on page 3 and sign form on page 2  
→

### If you ticked Option A):

- I will start a new Job, please transfer my pension fund assets to the pension fund of the new company (please provide address & account number or enclose payment slip):  
\_\_\_\_\_
- I will not start a new Job as an employee: Transfer all pension monies to a vested benefits account at Swisscanto, newly opened by, but not at, the PKSU.
- I will not start a new Job as an employee: Transfer all pension monies to a vested benefits account I already have opened myself: Please provide address & account Number (enclose transfer order).  
\_\_\_\_\_
- I will start my own business and I wish to have the cash being paid out (Full account details see appendix) → Official confirmation of employment needed

**If you ticked Option B):**

You have basically 2 choices: Either you leave the full amount in a vested benefit foundation account (not with PKSU) or you choose to have the amount which is not part of the legal minimum pursuant to LPP (see page 2 of insurance certificate, section "further information).

Should you intend to live in the EU/EEC and have no insurance coverage against death, invalidity or age, please contact the administration office of the PKSU.

- Transfer the amount to the newly opened vested benefits account @Swisscanto
- Full amount
  - Legal minimum only, rest to be transferred in cash, account detail see Appendix.  
**Remark:** Cash payout needs notarially certified signature of spouse OR spouse needs to sign in presence of pension fund staff.

- Transfer the amount to the following existing vested benefits account  
(enclose transfer order)
- 

- Full amount
  - Legal minimum only, rest to be transferred in cash, to the following account.  
(account detail see appendix)  
**Remark:** Cash payout needs notarially certified signature of spouse OR spouse needs to sign in presence of pension fund staff.
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**If you ticked Option C):**

If you leave Switzerland for a non-EU/EEC Country, you can have the full amount in cash – or leave it

- Transfer the whole amount in cash to the following account:  
**Remark:** Cash payout needs notarially certified signature of spouse OR spouse needs to sign in presence of pension fund staff.
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- Transfer the amount to the newly opened vested benefits account @Swisscanto
  - Transfer the amount to the following existing vested benefits account (enclose transfer order)
- 

**Remark for cash payout (Option B) and C):**

Withholding tax will be deducted – check with pension fund administration!

Place and date: \_\_\_\_\_

Signature: \_\_\_\_\_ Spouse's signature: \_\_\_\_\_

*Bitte Formular ausfüllen, unterzeichnen und an die Pensionskassenverwaltung zurücksenden.  
Zögern Sie nicht unklare Punkte zu besprechen.*

**Appendix 1:**  
**Account detail for cash payment**

Name of beneficiary \_\_\_\_\_

Address of beneficiary \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

IBAN-No. \_\_\_\_\_

Swift-No. \_\_\_\_\_

Name and Place of bank \_\_\_\_\_

\_\_\_\_\_

**Remark:**

*Account must have the insured person as beneficiary. It is not allowed to have the Monies wired to other persons.*

*→ Beneficiary must be the actual insured and employed person!*