

Vested Benefits Foundation of  
PFS Pension Fund Services AG  
P.O. Box  
CH-4002 Basel

Vested benefits account

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## Transfer to a pension fund or vested benefits foundation

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### Personal data of pension account holder<sup>1</sup>

_____ Last name	_____ First name
_____ Street, No.	_____ Postal code, City
_____ Date of birth	_____ 756. . . AHV No.
_____ Phone	_____ E-mail

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### Transfer reason

In principle, the pension account holder is obligated to transfer the vested benefits into the pension fund. The transfer to a vested benefits foundation is only allowed if it is not possible to make a transfer to the current pension fund.

On receipt, the processing time may be up to 20 working days. The documents submitted will not be returned. Copies are accepted.

**Transfer to a pension fund**

- Full balance
- Partial transfer: attach confirmation of purchase (incl. amount) or pension certificate

\_\_\_\_\_  
Name of pension fund

\_\_\_\_\_  
Starting date at new employer

\_\_\_\_\_  
Employer / Reference

– Attach payment slip / bank details of the pension fund

**Transfer to a vested benefits foundation in Switzerland (vested benefits account or policy)**

\_\_\_\_\_  
Name of vested benefits foundation

- Attach account opening confirmation of the new vested benefits foundation
- Attach payment slip / bank details of the new vested benefits foundation

**Divorce / Legally dissolved partnership**

- Attach copy of a legally binding Swiss divorce decree / Swiss dissolution judgement
- Attach payment slip / bank details of the vested benefits foundation / pension fund

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**Securities**

Investments in securities will be sold in the required amount by the payment date. A separate securities order is required if the investments in securities should be sold immediately, i. e. prior to the payment date.

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**The pension account holder hereby**

- confirms that this application and the documentation provided are correct and complete.
- authorizes the Vested Benefits Foundation of PFS Pension Fund Services AG to make any other enquiries that may be necessary.

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Place

Date (dd.mm.yyyy)

Signature of pension account holder

<sup>1</sup>The singular form also includes the plural, and all masculine terms referring to persons refer to persons of both genders.