

Vested Benefits Foundation of PFS
Pension Fund Services AG
P.O. Box
CH-8098 Zurich

Vested benefits account

Transfer to a pension fund or vested benefits foundation

Personal data of pension account holder¹

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

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

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.

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.

Place

Date (dd.mm.yyyy)

Signature of pension account holder

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