

3a retirement account number _____

Request for payout (standard withdrawal)

Please send to: **Stiftung Sparen 3 of Bank CIC (Switzerland) Ltd.**, c/o Bank CIC (Switzerland) Ltd., Marktplatz 13, 4001 Basel

The pension account holder named below instructs Stiftung Sparen 3 of Bank CIC (Switzerland) Ltd. to close the retirement relationship and to pay out the capital released as follows.

Pension account holder¹

Mr Ms

Surname: _____ First name: _____

Street, number: _____ Postcode, town/city: _____

Marital status: _____ Date of birth: _____

Nationality: _____ Telephone: _____

Reason for payout

Retirement age reached, upper age limit for further employment reached (max. five years after reaching retirement age) or **early pension release** (max. five years before reaching retirement age)

Date of payout

Date of payout: _____

Only dates in the future are possible (max. three months from the date of application).

Beneficiary payout instructions

Name and address of bank _____

Bank clearing number _____

IBAN/account number _____

Surname, first name, account holder _____

- Please transfer my pension assets to a new Bank CIC **cleverinvest** portfolio.*
- Please transfer my pension assets to a new Bank CIC **savings account**.*
- I would like an advisory meeting with Bank CIC (Switzerland) Ltd. regarding further options for investing my pension assets. Please give me a call, preferably between _____ and _____.

* Information about cleverinvest can be found at cic.ch/cleverinvest, while information about account solutions is available at cic.ch/fees.



¹ All terms also apply to women.



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I confirm that the information above is accurate and complete. I authorise Stiftung Sparen 3 of Bank CIC (Switzerland) Ltd. to conduct further checks if it deems this to be necessary.

Place and date:

Signature of pension account holder:

For internal purposes
Date: _____ Name of RM: _____ Initials of RM: _____