

3a retirement account number \_\_\_\_\_

## Request for payout (exceptional 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/applicant named below hereby requests Stiftung Sparen 3 of Bank CIC (Switzerland) Ltd. to pay out pension assets in the amount specified below.

### Pension account holder<sup>1</sup>

Mr       Ms

Surname:	First name:
Street, number:	Postcode, town/city:
Marital status:	Date of birth:
Nationality:	Telephone:

If the applicant and pension account holder are not the same person:

Surname:	First name:
Street, number:	Postcode, town/city:

### Reason for payout (with necessary documentation)

- Death of the pension account holder**
  - Copy of the death certificate **and** family certificate **and**
  - Certificate of inheritance

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- Invalidity** (full disability pension drawn)
  - Up-to-date copy of the Federal Invalidity Insurance certificate

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- Divorce/partnership legally dissolved**
  - Copy of the legally binding divorce decree/decree dissolving the partnership (foreign divorce decrees recognised and executed by a Swiss court) **and**
  - Confirmation from the new pillar 3a pension institution or copy of the pension agreement with the new pillar 3a pension institution

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- Transfer to spouse/registered partner following marital property change**
  - Copy of the notarised contract concerning the marital property **and**
  - Confirmation from the new pillar 3a pension institution or copy of the pension agreement with the new pillar 3a pension institution

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- Buy-ins to the pension fund (pillar 2)**
  - Pension fund certificate showing the maximum possible buy-in amount

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- Transfer to another pillar 3a pension institution**
  - Confirmation from the pillar 3a pension institution or copy of the pension agreement with the new pillar 3a pension institution

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- Becoming self-employed in your main job**  
(payout only possible within one year of becoming self-employed)
  - Up-to-date copy of a certificate from the Old-Age and Survivors' Insurance (AHV) compensation office
  - Signature of spouse/registered partner and copy of an up-to-date identity document for the spouse/registered partner



<sup>1</sup> All terms also apply to women.

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- Emigrating from Switzerland** (payout no sooner than one month before leaving Switzerland) **or**  
**cross-border commuters definitively giving up gainful employment in Switzerland**
- Copy of the deregistration certificate issued by the Swiss residents' registration office (date of deregistration no older than one year) **or**
  - Copy of the up-to-date certificate of residence abroad **or for cross-border commuters**
  - Copy of the confirmation of the annulled cross-border commuter permit **and**
  - Signature of spouse/registered partner and copy of an up-to-date identity document for the spouse/registered partner

Please note that in accordance with the regulations in force, processing fees are charged when this reason for payout applies. The relevant fees can be found on Bank CIC's website at [www.cic.ch](http://www.cic.ch).

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**Amount to be withdrawn**

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- Withdrawal of the entire retirement assets including the proceeds of the redemption of any units held in retirement funds.  Do not close retirement account
- Close retirement account

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- Partial withdrawal in the amount of CHF  
(only possible in the case of divorce/partnership legally dissolved)

Any units held in retirement funds will be redeemed in the amount required.

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**Date of payout**

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**Date of payout:** \_\_\_\_\_

Only dates in the future are possible (max. three months from the date of application) and these can only be fulfilled by Stiftung Sparen 3 of Bank CIC (Switzerland) Ltd. if all the documentation required for the payout is provided in advance (at least ten working days prior to the date of the payout). The pension account holder is responsible for ensuring that the documents are complete.

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**Beneficiary payout instructions**

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Name and address of bank/pension institution \_\_\_\_\_

Bank clearing number \_\_\_\_\_

IBAN/account number \_\_\_\_\_

Surname, first name, account holder \_\_\_\_\_

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I confirm that the information above and the documentation submitted are 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/applicant:

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Place and date:

Signature of spouse/registered partner:  
(if becoming self-employed or if emigrating from Switzerland)

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Please enclose a certified copy of an up-to-date identity document for the spouse/registered partner:  
(the original certified document needs to be available).

If not married or in a registered partnership, please enclose official confirmation of marital status (no older than one month).

**For internal purposes**

Date: \_\_\_\_\_ Name of RM: \_\_\_\_\_ Initials of RM: \_\_\_\_\_