

Name and address of previous pillar 3a pension institution

Request to transfer pillar 3a pension assets

- Procedure:**
1. Part A must be fully completed by the saver and signed.
 2. Stiftung Sparen 3 of Bank CIC (Switzerland) Ltd. completes Part B and then forwards the form directly to the previous pension institution.
 3. The pillar 3a pension assets will be transferred directly.

Personal details of the saver (client)

Surname:	First name:
Street, no.:	Postal code, city:
Date of birth:	

Request to the previous pillar 3a pension institution

Retirement savings account number of previous pillar 3a institution:

Transfer and close account

A

I hereby instruct my previous pension institution to transfer my pension assets held in the above retirement savings account to the collective account of Stiftung Sparen 3 of Bank CIC (Switzerland) Ltd. specified below.
I further instruct my previous pension institution to redeem any units in collective securities portfolios and likewise transfer the resultant proceeds to the collective account of Stiftung Sparen 3a of Bank CIC (Switzerland) Ltd. specified below. Upon receipt in the collective account of the foundation my 3a retirement savings account below will be effectively credited.

Transfer to the following collective account	CH46 0871 0000 7527 0200 2
IBAN:	
Held by:	Stiftung Sparen 3 of Bank CIC (Switzerland) Ltd.
for final credit to (to be completed by Stiftung Sparen 3)	3a retirement savings account no.
	Held by:
Place and date:	Signature of saver:

Confirmation by Stiftung Sparen 3 of Bank CIC (Switzerland) Ltd.

Stiftung Sparen 3 of Bank CIC (Schweiz) AG hereby confirms that the above 3a retirement savings account is a pillar 3a retirement savings account pursuant to the statutory regulations governing tied retirement provision.

B

Place and date: _____ Signature Stiftung Sparen 3 of Bank CIC (Switzerland) Ltd.

Information for the saver (client):

Please send this form to: Stiftung Sparen 3 of Bank CIC (Switzerland) Ltd., Marktplatz 13, PO Box, 4001 Basel.