Tellco pkPRO
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Application for cash payment / transfer

Employer **Contract no.**

Insured person

○ Mr ○ Ms

Surname		First name	
Street		Postcode, Place	
Telephone (private)		E-Mail (private)	
Date of birth		Insured no.	
Marital status		Date of marriage	

Transfer to new pension scheme (pension fund, vested benefits foundation)

Please enclose a payment slip from the new pension scheme.

New employer		Postcode, Place	
New pension scheme		Contract no.	
Bank		Account no. / IBAN	

☐ Opening an account at the Tellco Vested Benefits Foundation

Cash payment of vested benefits

Reason for payment	Required documents
○ I am leaving Switzerland / Principality of Liechtenstein definitively and moving my residence to The residence is located ○ in an EU / EFTA state* ○ outside an EU / EFTA state Please enclose official confirmation of departure.	Confirmation of departure from the most recent Swiss municipality of residence (not older than 6 months) or current certificate of residence
○ Self-employed activity as primary occupation	— OASI funding confirmation with declared OASI gross annual in come including copy of application for OASI — Copy of passport/ID of spouse/partner with legible signature — Self-employment may not have started longer than one year ago.
○ Vested benefits amount to less than one annual contribution	
○ Reaching the statutory retirement age (no earlier than 7 years prior to this and no later than 5 years afterwards)	
○ Death of the insured	To be proven by the beneficiaries by submitting a death certificate, certificate of inheritance and family certificate

Regulations according to marital status	Required documents
— Married or registered partnership	Written consent of spouse / partner
— Divorced persons or persons whose partnership has been legally dissolved	Copy of divorce decree Official certificate of marital status (not older than 1 month)
— Persons who are single or who live in an unregistered partnership or widowed persons	Official certificate of marital status (not older than 1 month)

The insured declares:

- ○ that he / she has not purchased any additional benefits from an occupational pension fund in the last 3 years
- ○ that he / she has purchased additional benefits from an occupational pension fund as confirmed by the enclosed certificate (enclose certificate)

Banking details

Please enclose a payment slip.

Bank / Post		Postcode, Place	
Account no.		IBAN	

Signature / s

Place, Date	Insured person
I agree to the cash payment.	Spouse or registered partner

For amounts up to CHF 10,000 we need copies of the spouse / partner passport or identity document.

Official certification of signature of the spouse / partner (for cash payments) for amounts exceeding CHF 10,000

(Justice of the peace, notary public or municipality of residence)

* If you are leaving Switzerland definitively and moving your residence to a EU / EFTA country or are a frontier worker residing in a EU / EFTA country and are definitively giving up your occupation in Switzerland, since 1 June 2007 you can only request cash payment of the part of your vested benefits which is above the obligatory level, if a duty to contribute to a mandatory state insurance scheme exists for you at the new place of establishment (frontier worker: at the previous domicile). The obligatory part of the vested benefits is to be invested in a vested interests account in Switzerland. You can clarify whether a duty to contribute to a mandatory state insurance scheme exists for you by using the appropriate form at www.verbindungsstelle.ch.