

Note for the insured person

When you leave your current pension fund, you are usually entitled to a vested termination benefit (also known as a departure payment). These occupational pension assets (2nd pillar) are made up of your employee contributions, the employer contributions, any personal purchases and interest, etc. Your vested termination benefit or a part thereof may also be in a vested benefits account or a vested benefits policy.

As you are now insured with comPlan, your vested termination benefit must be transferred by law to comPlan, in accordance with Art. 3(1) of the Vested Benefits Act (Freizügigkeitsgesetz, FZG). **Please complete and sign this form, and then forward it to your current pension fund in order to arrange the transfer to comPlan.** Once your assets have been received, comPlan will credit your individual retirement account with this amount and provide you with an updated pension statement. Interest is paid on the savings at the earliest from the time you join comPlan.

Do you have vested termination benefits with more than one pension fund? Further copies of this form can be found at www.pk-complan.ch/welcome.

Are you not sure where your occupational pension assets are? Contact the 2nd Pillar Central Office (www.zentralstelle.ch).

Would you like to transfer only the part of your vested termination benefit to comPlan that is needed to purchase the full regulatory benefits? Please get in touch with us.

Personal details

Name First name

Address

AHV number Date of birth

Telephone number

Previous employer (contract number, if applicable).....

or number of the vested benefits account/policy

Transfer instruction for the current pension scheme

Please transfer my entire vested termination benefit as follows:

Bank Credit Suisse, 8070 Zurich (clearing no. 4835, postal account no. 80-500-4)
IBAN CH72 0483 5096 2103 9100 2
Payable to comPlan, Stadtbachstrasse 36, 3012 Berne
Payment purpose Name, AHV number, BVG share of the transfer amount

The current pension scheme is requested to send a copy of the departure payment statement to comPlan, Stadtbachstrasse 36, 3012 Bern. Thank you.

Place and date Signature

Please forward to your current pension scheme