

Entry notification from the employer

(Details of the employee to be insured)

Company

Mr	Ms
Surname	First name
Street	
Postcode/City/Country	
Date of birth	SI number 756.

Civil status	single	married	divorced
	registered partnership	dissolved partnership	widowed
Support obligation	yes	no	

Group/Plan	Company entry date
Employment level (%)	Insurance commencement date

Entry up to 15th day of the month: First day of the month / Entry after the 16th day of the month: First day of the following month

OASI annual salary (monthly salary x 12 or x 13)	HR number
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Does the person to be insured:

have a complementary or executive pension? yes no
 ➔ If yes: which?

have an occupational pension with an external institution? yes no
 ➔ If yes: which?

Does the person to be insured have full capacity to work at the time the insurance is to commence? yes no

They are not considered to have full capacity to work if, at the insurance commencement date, they

- are unable to attend work either fully or partially due to health reasons,
- are drawing daily allowances due to illness or an accident or have already registered a claim with an insurer,
- are drawing a full disability pension,
- can no longer attend their training to the level required due to health reasons.

Place, date

Employer's stamp and signature

Entry notification from the employee

1. Insured person

Company

Surname First name

Street

Postcode/City/Country

Date of birth SI number 756.

Nationality

Tel. no. E-mail

Correspondence German French Italian English

Civil status single married divorced
registered partnership dissolved partnership widowed

Date of marriage/registered partnership

Surname, first name, date of birth of spouse/partner

Company entry date Employment level (%)

All available exit benefits from previous pension schemes must be transferred to us (Art. 60a OPO 2).

- ➔ **We will send you the details for this transfer once we have received your entry conformation and pension certificate.**

2. Details required

Have you previously made an early withdrawal to purchase property (WEF)? yes no

Is your vested benefit pledged? yes no

Have you been fully or partially unable to work for more than one month in the last two years, or did you have limited capacity to work at the time your insurance began? yes no

- ➔ **If yes: you must complete the enclosed health questionnaire.**
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Surname	First name
SI number 756.	

Are you receiving benefits from disability insurance, military insurance, accident insurance or another occupational pension scheme?	yes	no
If yes: which scheme(s)?	Degree of DI	%

➔ Existing decisions/authorisations must be sent to us.

Please send the completed entry notification directly to us within 14 days. You can find our address in the letterhead.

Place, date	Employee's signature
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Health questionnaire

You do not need to inform us about the following: Tonsillitis, appendicitis, flu, colds, mumps, measles, rubella, chickenpox, contraceptives, childbirth and gynaecological examinations whose results were in the normal range.

Surname/First name _____ SI number 756.

Height _____ cm Weight _____ kg

Do you regularly take medication? _____ yes _____ no

➔ If yes: for what reason?

➔ Since when?

➔ Doctor providing treatment (exact address)?

Have you received or are you currently receiving treatment for alcohol or drug abuse, or have you ever been advised to undergo treatment of this nature? _____ yes _____ no

➔ If yes: when?

➔ For how long?

➔ Treatment method?

Are you currently experiencing physical or psychological/mental illness, disorders or problems, or have you experienced them in the last five years? Are you experiencing the long-term effects of an accident or illness? _____ yes _____ no

Type of illness/accident, affliction, treatment, examinations	from	to	Duration of incapacity for work	Doctor, hospital or specialist (exact address and department)	Recovered without complications?

Duty of Notification and Data Protection Declaration

Insurers may require you to complete a risk assessment before accepting you into a scheduled insurance scheme.

Valitas Sammelstiftung BVG (hereafter "Valitas") must transfer these risk assessments to any other reinsurers and to medical examiners for processing. As part of this process, Valitas and other reinsurers, as well as medical examiners, require full rights to check the information that you provide in the health questionnaire and to obtain further health-related information about you. Valitas and other reinsurers, as well as medical examiners, will process information about the state of your health for risk assessment purposes and to justify any reservations of rights.

I hereby declare that I have answered all of the questions on this form truthfully and in full. I acknowledge that any breach of my duty of notification may result in my benefits being reduced or refused and in claims for compensation being asserted against me. I consent to my health data being transferred to Valitas and any other reinsurers as well as to medical examiners, and agree that they may use that data for the purposes set forth in this document. Valitas may obtain relevant information regarding my claims history from my previous insurer or third parties, in particular authorities, medical practitioners and their auxiliary staff, as well as social insurance and occupational pension schemes to which I am or was affiliated, in particular for the purposes of risk evaluation and claims management. I also consent to the obtaining of particularly sensitive personal data (e.g. health data) and personality profiles or the accessing and inspection of files maintained by public authorities where this is necessary for risk assessment purposes and for assessing my entitlement to benefits. To this end, I expressly release these medical practitioners and their auxiliary staff from their duty of confidentiality.

Place, date _____ Employee's signature _____