

## Notification of Retirement (Employer)

Company

Date of retirement

Name

First name

Street/no.

ZIP code/town

Date of birth

SI number

756.

Marital status

single

married

divorced

registered partnership

dissolved partnership

widowed

Regular retirement

Early or deferred retirement

Partial retirement of

%

New AHV salary

New level of employment (%)

Is the insured person able to work full time?

yes

no

### Insured persons entitled to a pension of the Foundation for a Flexible Retirement Age (Stiftung FAR)

Insured persons who are entitled to a FAR-pension cannot stay insured with Valitas Sammelstiftung BVG.

Application with "Stiftung FAR" has been filed (please enclose a copy).

The savings capital needs to be transferred. The available options are:

the **compulsory part** (LOB/BVG) is transferred to the Substitute Occupational Benefit Institution, the over-compulsory part is paid out as a cash payment to a private account.

the **full amount** is transferred to the Substitute Occupational Benefit Institution (please contact the Institution prior to the transfer).

the **full amount** is paid out as a cash payment to a private account.

A transfer of the vested benefits to a vested benefits foundation is not possible.

Date

Employer's signature and stamp

## Notification of Retirement (Employee)

Company

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Date of retirement

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### Lifelong Old Age Pension or a Lump-Sum Payout

If you wish to receive a lump-sum payment, you must send a written notification to the pension fund Valitas **at least 1 month prior to your retirement**. Due to tax reasons, a lump-sum payment is not allowed if a voluntary contribution has been made within three years before your retirement.

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### Cash Payment

I choose the cash payment of the full amount (100%)

I choose the partial cash payment of CHF \_\_\_\_\_ or \_\_\_\_\_%

Once the cash payment has been executed, any and all claims against Valitas Sammelstiftung BVG are entirely satisfied. No further benefits shall be granted (neither to children nor to survivors); if you choose partial cash payment, these benefits shall be reduced according to the percentage of the cash payment.

**Required documents** (not older than 3 months):

- Certificate of Civil Status (unmarried insurees) / Family Certificate (married insurees / registered partners)
  - Current Certificate of Civil Status of your life partner
  - Officially certified signature of the spouse or the life partner
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### Pension

I choose the full pension (100%)

I choose the partial pension (pension amount per year): CHF \_\_\_\_\_

**Required documents** (not older than 3 months):

- Certificate of Civil Status (unmarried insurees) / Family Certificate (married insurees / registered partners)
  - Current Certificate of Civil Status of your life partner
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## Children's Pension

Entitled to a children's pension are children

- a) up to their 18<sup>th</sup> birthday
- b) or, after their 18<sup>th</sup> birthday, until the end of their training but no longer than their 25<sup>th</sup> birthday.

Name, first name and date of birth:

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### Required documents:

- Current Family Certificate mentioning the date of birth of every child
- Confirmation of enrolment from a recognised institution for every child over the age of 18 (not older than 3 months)

## Payment Address

Bank

IBAN

Account holder

## Signatures

This document is a translation. In the event of a dispute, the German version shall prevail.

Date

Signature of the insured person

### Only required in case of cash or partial cash payment:

Date

Officially certified signature of spouse/  
registered partner/beneficiary\*

\*The certification must be made on this form and may not be older than 3 months.