

Retirement notification from the employer

Company

Retirement with effect from

Surname

First name

Street, no.

Postcode/City/Country

Date of birth

AHV/AVS number

Civil status

single

married

divorced

registered partnership

dissolved partnership

widowed

ordinary retirement

as of

early retirement

as of

deferred retirement

as of

semi-retirement

% as of

New OASI annual salary

CHF

New level of employment

%

Does the insured person have full capacity to work?

yes

no

Bridging pension from Stiftung FAR or VRM

Insured persons who are withdrawing from compulsory insurance due to receiving a bridging pension for flexible retirement from an institution that provides this benefit (e.g. Stiftung FAR or VRM) may continue their individual retirement pension up to the normal age of retirement.

The employee wishes to transfer to voluntary continued insurance from FAR or VRM

- ➔ Please only submit the first page of this form.
- ➔ The "Transferring to voluntary continued insurance from FAR or VRM" form must also be submitted. We must receive the form no later than 30 days before the bridging pension claim is due to start.

Place, date

Employer's stamp and signature

Retirement notification from the employee

1. Insured person

Company

Retirement with effect from _____ to _____ %

Surname _____ First name _____

Street, no. _____

Postcode/City/Country _____

Date of birth _____ AHV/AVS number _____

Tel. no. _____ E-mail _____

Civil status single married divorced
 registered partnership dissolved partnership widowed

2. Restrictions on drawing retirement capital

Voluntary purchases within the last three years are paid out as retirement pensions. They may not be drawn as capital. When capital payments are made, the tax authorities check the tax deductibility of voluntary purchases made within the last three years. You can obtain more detailed information about this from your tax authority.

Have you made voluntary purchases in the occupational pension scheme in the last three years?

yes no

If you would like to draw (part of) your retirement capital instead of a retirement pension, you must provide written notice **at least one month before retiring**.

3. Drawing retirement capital and/or a retirement pension

I would like to draw **the entirety of my retirement assets (100%) as a one-off capital payment**.

By paying out the entirety of your retirement assets, all of your claims vis-à-vis the occupational pension scheme shall be deemed fulfilled; no further benefits (child's pensions, benefits for surviving dependents) shall be due.

I would like to draw **the entirety of my retirement assets (100%) as a life-long monthly retirement pension**.

I would like to draw **part of my retirement assets as capital**. By doing this, my life-long, monthly retirement pension will be reduced accordingly.

Capital payment CHF or % of the retirement assets

By paying out part of your retirement assets, your retirement pension as well as any child's pensions and benefits for surviving dependents will be reduced accordingly.

Surname

First name

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Registration of retiree's child pension

There is an entitlement to retiree's child pensions for the children of those drawing retirement pensions who

- a) have not yet reached the age of 18
- b) are still in education and have not yet reached the age of 25
- c) are at least two thirds disabled and have not yet reached the age of 25

Surname

First name

Date of birth

AHV/AVS number

4. Tax obligation self-declaration

As of retirement date

I am liable to pay tax:

in Switzerland

in the following country

I undertake to inform the occupational pension scheme immediately should the location of my tax obligation change before my retirement date.

5. Required documents

The documents may be **no more than three months** old.

When drawing part or all of capital

- Unmarried: civil status certificate
- Married or in a registered partnership: family booklet (new version or pre-2006 version)/partnership certificate
- Officially verified or notarially certified signature from your spouse or registered partner

When registering an entitlement to a retiree's child pension

- Up-to-date family booklet with the dates of birth of all children
- Up-to-date confirmation of educational status (e.g. copy of apprenticeship contract, confirmation of student status) for all children over the age of 18

Surname

First name

AHV/AVS number

6. Payment address

Payment address for retirement
pension

Payment address for retirement capital
(if different from the address for retirement pension)

Account holder

Bank and address

IBAN

For accounts located
abroad: SWIFT

7. Signature(s)

Place, date

Insured person's signature

Essential when drawing part or all of capital:

Place, date

Officially verified or notarially certified signature from
your spouse or registered partner*

***The notarial certification or official verification must be made on this form and may be no more than three months old as of the date of retirement!**