

Employer exit notification in the event of transfer of the exit benefit

Company

Exit date

Exit up to 15th day of the month: End of the previous month / Exit after the 16th day of the month: End of the month

Surname

First name

Street, no.

Postcode/City/Country

Date of birth

AHV/AVS number

Civil status

single

married

divorced

registered partnership

dissolved partnership

widowed

Does the insured person have full capacity to work?

Yes

No

➔ Degree of incapacity to work

%

Has the incapacity lasted, or is it expected to last, **longer than 90 days?**

yes no

➔ If yes: Please also complete the "Notification of incapacity to work" form and send it to us.

While the insured person does not have the capacity to work and the occupational pension scheme is assessing its duty to pay benefits, the exit cannot be processed in full.

Was the insured person previously subject to withholding tax?

yes no

Is the employee's exit due to economic reasons?

yes no

➔ If yes: does this relate to a reduction in the workforce or a restructure that may result in a partial liquidation of the pension fund?

yes no

Place, date

Employer's stamp and signature

Employee exit notification in the event of transfer of the exit benefit

1. Insured person

Company

Exit date

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

Date of marriage/registered partnership

Capacity to work

Did you have full capacity to work at the date of exit?

yes no

You have three options for transferring your vested benefits (entry into a new occupational pension scheme, transfer to a vested benefits custody account or transfer to a vested benefits account). You can also find information about your options in the enclosed information sheet "Transferring your exit benefit and insurance cover".

2. Employee is joining a new occupational pension scheme (changing job)

New employer/Contract number

New occupational pension scheme

Bank

IBAN

➔ Please include a pay-in slip for the new occupational pension scheme.

Place, date

Employee's signature

Surname

First name

AHV/AVS number

3. Transfer of the exit benefit to a vested benefits custody account

You do not have a new job, your new earnings do not permit entry into a new occupational pension scheme, or you would not like to invest a part of the exit benefit in the new occupational pension scheme.

Vested benefits custody accounts provide the opportunity to gain increased returns in comparison to vested benefits accounts or vested benefits policies. With a vested benefits custody account, you can invest your vested benefits in securities in a broadly diversified and cost-effective manner. Our external finance partner is on hand to advise and support you when opening a vested benefits custody account, choosing a suitable investment strategy and transferring the vested benefits.

I am interested in a non-binding, free consultation session on vested benefits custody accounts. Please send me more details.

We are happy to arrange a consultation session for you either via telephone or video call. We will also provide you with informational handouts and a form with a declaration of consent to the transfer of your contact details for setting up the consultation session.

4. Transfer of the exit benefit to a vested benefits account or a vested benefits policy

Transfer of the exit benefit

to the following vested benefits account or as credit to the following vested benefits policy:

Name of the vested benefits scheme

Bank

IBAN

➔ Please include a pay-in slip and confirmation of account opening from the vested benefits foundation.

Vested benefits account with the Vested Benefits Foundation of UBS AG (opened for you by Valitas)

Place, date

Employee's signature

Information sheet – Transferring your exit benefit and insurance cover

If you have a new employer and a new occupational pension scheme,

the full exit benefit must be transferred to the new employer's occupational pension scheme.

If you are not going to be entering a new occupational pension scheme immediately,

your exit benefit must be deposited in a vested benefits account temporarily.

You have the following options:

1. Opening a vested benefits custody account with our external finance partner

Insured persons have the option of investing vested interests as investment securities according to their needs. By investing in promising bonds and shares, you benefit from the possibility of higher returns in comparison to traditional accounts. We are happy to arrange a free consultation session with our external finance partner for you. Please get in contact with us if you are interested.

Valitas INDEPENDA
Tel. +41 58 411 11 11
independa@valitas.ch

2. Opening a vested benefits account with a Swiss bank of your choice

You can open a vested benefits account with a Swiss bank of your choice. To enable us to transfer your exit benefit to this account, we require confirmation that you have opened an account from the bank and a pay-in slip.

3. Opening a vested benefits account with the Vested Benefits Foundation of UBS AG through Valitas

No time to open a vested benefits account yourself? We can transfer your exit benefit directly to our partner foundation, the Vested Benefits Foundation of UBS AG in Basel. We do not require any further documentation to do this.

Vested Benefits Foundation of UBS AG
P.O. Box
CH-4002 Basel
Tel. +41 (0)61 226 75 75

As soon as you have a new employer and insurance with an occupational pension scheme,

you must request the vested benefits institution with whom your exit benefit has been temporarily deposited to transfer your exit benefit to the new occupational pension scheme. This is the only way to ensure that your retirement fund is not "forgotten" and that you benefit from all the money you have paid in when you come to retire.

End of pension coverage following your exit

Your pension coverage ends on the day you leave the occupational pension scheme (always the end of the month). If you do not join another occupational pension scheme, your pension coverage for the risks of death and disability shall remain in place for a maximum of one month. If a claim arises during this time (death or disability), cash payment will no longer be possible.