ufsz
Unabhängige Freizügigkeitsstiftung Schwyz

Vested Benefits Agreement: Opening and immediate payout

The undersigned (hereinafter referred to as the 'insured person' or 'I') applies to conclude a vested benefit agreement with the Unabhängige Freizügigkeitsstiftung Schwyz (hereinafter referred to as "ufsz" or 'Foundation') with an immediate payment of vested benefits due to permanent departure from Switzerland or reaching retirement age with residence abroad.

Data on the account holder

Salutation		Title		
❑ Mr	❑ Ms/Mrs	❑ Dr	❑ Prof.	❑ Prof. Dr

Surname	First name

Address	Postcode, City

National insurance number (AHV)	Civil status/since	Date of birth
756.		

Nationality(ies)	Mobile phone number	E-mail address

Have you made any occupational pension purchases in the last 3 years?

❑ No ❑ Yes, date of last purchase:

If purchases have been made, the resulting benefits may not be withdrawn from the pension fund in the form of a lump sum (of any kind) within the next three years (blocked portion). The non-blocked portion can generally be withdrawn as a lump sum. However, the current practice of the tax authorities must be observed so that no tax disadvantages arise.

Departure data/destination country

Address in destination country, if different from current address	valid from

❑ Non-EU/EFTA - withdrawal of the entire vested benefit

❑ EU/EFTA - withdrawal of the non-mandatory portion or total amount with enclosed SIFO confirmation

❑ I confirm that I no longer live and work in Switzerland

If you leave Switzerland for the EU or an EFTA member state, you can only withdraw your vested benefit assets if you are no longer gainfully employed in Switzerland.

Applicable law and place of jurisdiction

All legal relationships are subject to Swiss law. For all insured persons domiciled in Switzerland, the place of fulfilment, place of jurisdiction and place of debt collection shall be determined in accordance with the statutory provisions. The place of fulfilment, place of jurisdiction and place of debt collection for insured persons domiciled abroad is the registered office of the Foundation.

Explanations

The account holder recognises the current versions of the pension fund-, fee- and investment-regulations (hereinafter referred to as 'regulations'), which can be viewed at any time at www.ufsz.ch, and the Foundation's current Articles of Association as binding and integral parts of this vested benefit agreement. In particular, the account holder acknowledges that the Board of Trustees may decide to amend the Regulations and the Articles of Association at any time.

By signing this document, the client confirms that he/she has read and understood this vested benefit agreement and the regulations and that he/she agrees to their content.

Payout & costs

Payment is made at the earliest on the cancellation date. The insured person will receive a detailed withdrawal statement.
- Payment fee up to age 60: CHF 400.00
- Payment fee after reaching age 60: CHF 250.00

Required documents

- Copy of the insured person's passport/ID (with legible signature)

- Copy of the confirmation of deregistration from the last municipality of residence in Switzerland (deregistration date not older than 12 months)

or

- Current confirmation of residence abroad (not older than 6 months)

- If not married or living in a registered partnership: civil status certificate/official civil status confirmation (not older than 1 month)

or

- Married person or person living in a registered partnership: copy of passport/ID of spouse/registered partner (with legible signature)

If travelling to an EU/EFTA country and withdrawing the entire vested benefit assets:
- SIFO confirmation: Confirmation from the LOB Guarantee Fund that the insured person is not subject to statutory social insurance in the country of domicile. To be referred to www.verbindungsstelle.ch.

Bank transfer

Name of account holder (must be the same as the account holder):

IBAN:

CH

I request payment of the vested benefits assets in accordance with the above application. I acknowledge that the Independent Vested Benefits Foundation Schwyz must report the payout to the Swiss Federal Tax Administration and deduct withholding tax.

Signature of account holder

Surname	First name
Place, Date	Signature of account holder
Place, Date	Signature of spouse / registered partner

Important note: From a payout amount of CHF 50,000.00, the signature of the spouse or registered partner must be notarised. Please only sign on site, e.g. at the notary's office or at the municipality of residence.

Notarisation of the signature of the spouse/registered partner (by a notary or a notary public)

Stamp and signature of the notary public

Balancing order for the previous 2nd pillar institution

Sender (client/beneficiary)

Surname	First name	Date of birth
Address	**Postcode, City**	**National insurance number (AHV)**
		756.

2nd pillar institution

Name and address of the previous pension fund/vested benefits foundation/insurance company (contractor))	Leaving date

I would ask you to transfer the vested benefits deposited with you, observing the notice period, in your favour:

SPARKASSE SCHWYZ AG
6431 Schwyz

Kto. Nr. 74.020.098.783.0
IBAN CH04 0663 3740 2009 8783 0
Unabhängige Freizügigkeitsstiftung Schwyz
6431 Schwyz
FZL Name/Vorname

Signature of account holder

Place, Date	Signature of account holder

Confirmation / signature of the foundation

We hereby confirm that the vested benefits account is an account of the account holder with Sparkasse Schwyz AG in accordance with Art. 82 BVG and Art. 19 para. 1-2 FZV.

Sparkasse Schwyz AG