

Account number

Payment of pension assets when taking up self-employment in Switzerland

Personal data of the Contracting Party

Surname

First name

Street, number

Postcode

City or town

Date of birth

Civil status

Citizenship

Telephone

Social security number

Additional information on the withdrawal

Self-employed as main occupation since

Brief description of the activity

Estimated turnover – 1st year

 CHF

Estimated turnover – 2nd year

 CHF

Estimated turnover – 3rd year

 CHF

Estimated profit – 1st year

 CHF

Estimated profit – 2nd year

 CHF

Estimated profit – 3rd year

 CHF

Note: Payment is only possible within one year after taking up self-employment (main occupation).

Due date

The payment will be made on the next possible date.

Note: Note: The processing time can be up to 25 working days as of receipt of the letter. The closing value of the Contracting Party's account is based on the value that is determined after the Foundation has received the legally valid notice of termination including the documents required by the Foundation.

Documents to be submitted

- Copy of official ID with signature of the Contracting Party
- Copy of an official ID with signature of the spouse / registered partner
- For Contracting Parties who are not married and reside abroad: Confirmation of current civil status (civil status certificate not older than 3 months)
- Confirmation of acceptance from the OASI compensation fund

Payment instructions

Bank name

Swift / BIC

IBAN / account number

In the name of (surname, first name)

Note: Please note that it is essential that the account be in the name of the Contracting Party. The transfer is made in Swiss francs.

Signature and confirmation

With their signature, the Contracting Party confirms

- that this application and the documents submitted are correct and complete.
- that the Contracting Party takes up self-employment as his / her main occupation, invests the pension benefits in full in his / her own business and is no longer subject to the compulsory occupational benefit scheme.
- that he / she is aware of the tax consequences in the event of non-recognition of the commencement of self-employment. This includes, in particular, the ordinary taxation of the capital withdrawal.

Place, date

Signature of the Contracting Party

With their signature, the spouse / registered partner confirms that they consent to the payment.

Place, date

Signature of spouse / registered partner

Authentication / identification of the signature

Official authentication or regulatory identification of the signature of the Contracting Party

Place, date

Signature of notary public / official (stamp) / signature of Zugerberg Finanz AG or Beratungsgesellschaft für die zweite Säule AG

Official authentication or regulatory identification of the signature of the spouse / registered partner

Place, date

Signature of notary public / official (stamp) / signature of Zugerberg Finanz AG or Beratungsgesellschaft für die zweite Säule AG

Delivery by mail

Please return the completed form with all relevant documents to:
Zugerberg 3a Vorsorgestiftung, Lüssiweg 47, CH-6302 Zug