

Account number

## Transfer to a pension scheme or other vested benefits foundation

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### Personal data of the Contracting Party

Surname

First name

Street, number

Postcode

City or town

Date of birth

Civil status

Citizenship

Telephone number

Social security number

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### Reason for transfer

In principle, the Contracting Party has the obligation to pay the vested benefits into the pension scheme. Transfer to a vested benefits foundation is only permitted if no transfer to the current pension scheme is possible.

- Transfer to a pension scheme       whole credit       partial transfer (only possible in the case of retroactive partial invalidity)

Pension scheme name

Date of entry into pension scheme

Employer / Reference

- Transfer to another vested benefits foundation in Switzerland (vested benefits account / policy)

Name of the vested benefits foundation

Reason for change of foundation

- Change of marital status       Marriage       Divorce / partnership dissolved by court order

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**Due date**

The payment will be made on the next possible date.

Note: The processing time can be up to 25 working days as of receipt of the letter. The Foundation carries out a portfolio valuation twice a month, in the middle and at the end of each month. 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. The disbursement of the balance value to the Contracting Party will be made within 10 business days after the valuation of the securities account, after the Foundation has received all the necessary documents and complete (transfer) information from the Contracting Party.

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**Documents to be submitted**

- Payment slip / confirmation of the pension scheme's account details
- Confirmation of opening of an account by the new vested benefit foundation
- Marriage certificate / copy of the legally binding Swiss divorce or dissolution decree

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**Signature and confirmation**

With their signature, the Contracting Party confirms that this application and the documents submitted are correct and complete.

Place, date

Signature of the Contracting Party

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**Delivery by mail**

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