

Account number

Transfer to another 3a pension scheme or pension fund

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

Reason for transfer

1) Transfer to another 3a pension fund in Switzerland

Name of the 3a pension fund

Reason for change of foundation

2) Transfer to a pension scheme

Pension scheme name

Date of entry into pension scheme

Employer / Reference

Note: Find out from your pension scheme whether it is possible to transfer your 3a assets.

3) Change of marital status

 Marriage Divorce / partnership dissolved by court order

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 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

In the event of reason for transfer 1: Confirmation of opening of an account by the new 3a pension fund

In the event of reason for transfer 2: Payment slip / confirmation of the pension scheme's account details / confirmation of the maximum purchase amount (in the case of partial payment) by the pension scheme

In case of change of civil status (item 3): Marriage certificate / copy of the legally binding Swiss divorce or dissolution decree

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

Delivery by mail

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