

APPLICATION FOR PAYOUT FROM RETIREMENT SAVINGS 3A

Retirement savings account no

Retirement savings member

Mr	Ms		
Last name		First Name	
Street, no.		Postcode	
Town/city		Country	
Nationality		Marital status	
Date of birth		Phone	

If the beneficiary is not the same person as the retirement savings member

Last name	First name
Street, no.	Postcode
Town/city	Country
Phone	

Reason for payout (including the necessary enclosures)

Please give the reason for the payout and enclose the necessary documents.

Statutory AHV retirement age reached

Early withdrawal (at the earliest 5 years before reaching statutory AHV retirement age)

Death of retirement savings member

- Copy of death certificate and family register and
- Certificate of inheritance and official register of heirs

Disability (full disability pension drawn)

- Copy of current decree from federal disability insurance scheme

Divorce/legally dissolved partnership

- Copy of legally binding divorce or dissolution judgment
(foreign divorce judgments recognized and enforced by a Swiss court)
- Confirmation or copy of retirement savings agreement of new pillar 3a retirement savings institution

Assignment to spouse/registered partner as a result of change in matrimonial property regime

- Copy of certified matrimonial property agreement
- Confirmation or copy of retirement savings agreement of new pillar 3a retirement savings institution

To buy into pension fund (pillar 2)

- Confirmation from pension fund regarding maximum allowable contribution

Transfer to another pillar 3a retirement savings institution

- Confirmation or copy of retirement savings agreement of new pillar 3a retirement savings institution

Commencement of self-employment or different self-employment

(a payout can only be disbursed within one year of the commencement date)

- Copy of current decree from AHV compensation fund
- Signature and copy of current identification document of spouse / registered partner

Permanent emigration from Switzerland

(a payout can be disbursed at the earliest one month before the date of departure from Switzerland)

- Copy of certificate of deregistration issued by Swiss residents' registration authority (date of deregistration not more than one year ago) **or**
- Copy of current certificate of residence in foreign country **or**
- Affidavit in foreign country (certified self-certification of place of residence)
- Signature and copy of current identification document of spouse / registered partner

If funds are to be used to finance a property purchase, use the *Home ownership assistance with retirement savings account 3a form only.*

Full withdrawal of retirement savings

Partial withdrawal of retirement savings

(only possible when buying into a pension fund and in the event of divorce/legal dissolution of partnership)

Do not close retirement savings account

Payout date

Amount in CHF

Transfer

May only be made to a private or joint account in the name of the retirement savings member.

To my bank account

To retirement savings institution

Name and address of bank/retirement savings institution

Last name, first name account holder

Bank clearing no.

IBAN

I confirm that the details given above and the documentation provided are correct and complete. I authorize the Foundation Swissquote 3rd Pillar to make any further enquiries that may be required. I also authorize the sale of any fund investments held by the Foundation Swissquote 3rd Pillar in the amount necessary by the payout date.

.....
Place, Date

.....
Signature of retirement savings member (please enclose a copy of a current identification document)

.....
Signature of spouse/registered partner

If you are not married or in a registered partnership, please enclose official confirmation of your marital status (no more than one month old).

If you were divorced or had your partnership legally dissolved within the last 6 months, also enclose a copy of the legally binding and complete divorce or dissolution judgment (foreign divorce judgements recognized and enforced by a Swiss court).

Original for the foundation

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Copy for the pension fund member