

## Application to continue the benefits agreement

### Client

Client number	Plan number
First name	Surname
Marital status	Street, number
Postcode	Town
Date of birth	Social security number
Telephone number	E-mail

### Legal basis

#### Ordinance on Tax Relief on Contributions to Recognised Pension Schemes (BVV/OPO 3)

##### Art. 3 para. 1

Retirement benefits may be paid out a maximum of five years before reaching the normal retirement age in accordance with Article 13 paragraph 1 of the Occupational Pensions Act (BVG/OPA). The benefits become due once the Client reaches the normal retirement age. If the Client provides evidence of still being in gainful employment, they may delay the withdrawal of benefits for a maximum of five years after reaching the normal retirement age.

##### Art. 7 para. 3

Contributions to recognised pension schemes may be made for a maximum of five years after reaching the normal retirement age.

##### Art. 7 para. 4

The full contribution may be made during the year in which gainful employment ends.

### Documents to be submitted

- Employee: written confirmation from the employer that employment is continuing beyond the OASI normal retirement age.
- Self-employed person: written confirmation from the OASI compensation fund that OASI contributions continue to be paid.

### Declaration from the Client to continue the benefits agreement

By signing this application,

- I confirm that I have acknowledged the above-mentioned legal provisions.
- I declare that I am still in gainful employment and would like to delay the withdrawal of my retirement benefits.
- I undertake to inform the Foundation about any changes relating to this.

I acknowledge that, if a subsequent non-fulfilment of the employment conditions is determined, unauthorised payments will be returned or my account will be closed.

Place	Date	Signature of the Client
_____	_____	_____

Please send the form to:

Sending address:

Sending address:

Use this cover sheet to forward the documents in a window envelope.