

Application for payment – voluntary contribution to the pension fund

Note:

If the available 3a assets are less than the amount of the maximum permissible voluntary contribution according to the pension fund statement, the entire assets are always transferred to the pension fund.

Client

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

Documents to be submitted

- Pension fund bank details or QR payment slip
- Current certificate from the pension fund stating the maximum permissible amount of voluntary contributions

Transfer to the following pension fund

IBAN	Name of the pension fund
Name of bank	Notification (contract number, employer)

I confirm that the information above is accurate and complete, as are the documents I have submitted. In the event of a full transfer of the capital, the pension account/custody account will be closed upon completion of the transaction. I permit the Independent Pension Foundation 3a Zurich to seek further clarification if necessary. At the same time, I issue the order to sell any securities investments in the amounts needed up to the payment date.

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.