

Application for payment – Leaving Switzerland permanently (EU & EFTA country)

Note:

On leaving Switzerland for the EU or an EFTA country, pension assets may only be withdrawn if the Client is not in gainful employment in Switzerland and their permanent residence is not located in Switzerland. Payment will take place at the earliest 5 days after notification of departure.

EU/EFTA countries:

Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Germany, Estonia, Finland, France, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain and Sweden

Client

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

Payment instruction

Withdrawal of the entire pension assets and closure of the pension relationship (SIFO confirmation available)

Withdrawal of the non-mandatory assets (SIFO confirmation not required)

Documents to be submitted

- Copy of the Client's passport/ID (bearing a legible signature)
- Copy of the confirmation of departure from the last municipality in Switzerland (departure date within the last 12 months) or current confirmation of residence abroad (issued within the last 6 months)
- SIFO confirmation (only for a full withdrawal of pension assets)
Confirmation from the LOB Guarantee Fund (Sicherheitsfonds BVG) www.sfbvg.ch/en/ that the Client is not subject to statutory social insurance in the state to which they are moving
- *If not married or living in a registered partnership:*
Certificate of civil status/official confirmation of civil status (issued less than 1 month ago)
or
- *People who are married or living in a registered partnership:*
Copy of the spouse/registered partner's passport/ID (bearing a legible signature)

I no longer live and work in Switzerland

Applicable

Foreign address:

Street, number

Postcode, town

Domicile/country

Incorrect (payment not possible)

Voluntary contributions to the pension fund

Have there been any voluntary contributions to the occupational pension scheme in the last 3 years?

Yes Date of the last contribution

No _____

If there have been contributions, the resulting benefits may not be withdrawn from the pension in the form of a lump sum (of whatever kind) within the next three years (blocked portion). The unblocked portion may in principle be withdrawn as a lump sum. However, current tax practice must be observed here. If a lump sum is withdrawn within three years of a voluntary contribution, deductibility of the contribution against income tax is not usually recognised. From the perspective of income tax, it may therefore be inadvisable to withdraw a lump sum within three years of making a voluntary contribution. We recommend clarifying the fiscal consequences of an advance withdrawal with the competent tax office in advance.

Transfer

Payment can only be made to an account in the Client's name

Beneficiary	IBAN
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Name of bank
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I confirm that the information above is accurate and complete, as are the documents I have submitted. If the entire capital is being withdrawn, the pension account/securities account will be closed once the funds have been transferred. I permit the Independent Vested Benefits Foundation Schwyz 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. I acknowledge that the Independent Vested Benefits Foundation Schwyz must report the payment to the Federal Tax Administration or deduct withholding tax.

Place	Date	Signature of the Client
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Place	Date	Signature of spouse/registered partner
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N.B.:

If the amount paid out exceeds CHF 50,000, the signature of the spouse or registered partner must be certified by a notary. Please sign first in situ, e.g. at the offices of the notary or municipality.

Certification of the signature of the spouse/registered partner by a notary or authenticating person:

Place	Date	Stamp and signature of the notary/authenticating person
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Please send the form to:

Sending address:

Sending address:

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