

Request for retirement benefits

v2025

Last name	First name
Language (French, German, English)	Private E-Mail
Private phone number	Mobile phone number
Date of retirement	AVS (OASI) number

Options (Please tick as appropriate)

- Total retirement benefits paid as pension
- Request for lump sum payment, request form at the back
- Partial retirement of _____ %
- Utilisation of early retirement account, request form at the back

Additional contribution/Purchase

I will make a purchase to improve my retirement benefits. This option is only possible if no request for lump sum payment is submitted. The payment has to be imperatively made before the end of employment.

- Yes, foreseen payment date _____ amount _____
- No

Bridge pension

- Amount at member's discretion, however should not exceed CHF 30'240 per year, respectively CHF 2'520 per month
- Financed by the member
- Lifetime reduction of the retirement pension, respectively of the relevant survivors' pension

I apply for a bridge pension

- Maximum amount
- Requested monthly amount of CHF _____
- No, no bridge pension requested

Instructions for payment of the monthly pension

Full address of tax residence at the time of retirement

Bank name and address

IBAN account number

Bank outside Switzerland - SWIFT/BIC

Currency (CHF, EUR, Other)

Place and date

Member's signature

Request for lump sum payment

Last name _____ First name _____

Date of retirement _____ AVS (OASI) number _____

Conditions for lump sum payment

- Request deadline: at least **3 months** prior to retirement date
- Request is irrevocable
- If married or in a registered partnership, spouse's agreement is compulsory
- 50% of the savings account under CHF 1'000'000 and 100% of the savings account over CHF 1'000'000
- Reduction of the pension and, if applicable, of the relevant survivors' pensions
- No future adjustment on the part of the pension withdrawn as lump sum
- Any benefit, paid out as lump sum or pension, is subject to tax

Lump sum payment or percentage requested **CHF or %** _____

Utilisation of Early retirement account (pre-financing)

Required Option:

- Total savings of early retirement account paid as lump sum. The savings must be added to the lump sum amount or percentage stated above
- The lump sum amount or percentage stated above already includes the savings of the early retirement account
- Conversion of the savings of the early retirement account into an additional pension
- No early retirement account

Instructions for payment of the lump sum

Bank name and address _____

IBAN account number _____

Bank outside Switzerland - SWIFT/BIC _____ Currency (CHF, EUR, Other) _____

Place and date _____ Member's signature _____

Place and date _____ Spouse's (**compulsory**) _____

Please enclose a copy of the passport or identity card of each signatory