

### Personal data

Name ..... First name .....  
Address .....  
AHV no. .... Date of birth .....  
Marital status ..... Telephone number.....

### Lump sum payment

- I wish to receive **all** of my retirement savings in the form of a one-off lump sum payment upon my upcoming (partial) retirement. The AHV bridging pension will also be paid out as a lump sum.
- I wish to receive .....% **OR\* CHF** ..... of my retirement savings in the form of a one-off lump sum payment upon my upcoming (partial) retirement. The remaining retirement savings will be converted into a lifelong retirement pension in accordance with the provisions of the Pension Fund Regulations valid at the time of retirement.

*\* Please complete only one (either percentage or CHF)*

### Voluntary buy-ins

Have you voluntarily bought into a pension fund of an occupational pension scheme in the last three years before retirement?

NO     YES    *If YES*    Date: .....    Amount: CHF.....

Pension fund: .....

### Signature

I hereby confirm that I have been informed about the consequences of receiving payment of retirement benefits as a lump sum and read the **information on the reverse of this form**.

Place and date .....    Signature .....

### Consent from spouse/registered partner

I consent to the payment of retirement benefits as a lump sum. In particular, I understand that no additional benefit entitlements will be due following the lump sum withdrawal, which also means no payment of a spouse's pension in the event of death.

Place and date .....    Signature .....

### Certification of signature of spouse/registered partner (municipal authority or a notary)

The authenticity of the above signature of .....,

born on .....,

residing in .....  
is officially certified.

Place and date .....

Stamp and signature .....

### Confirmation by comPlan

We hereby acknowledge receipt of the application for payment of retirement benefits as a lump sum.

Place and date .....    comPlan .....

.....

### **Consequences of lump sum payment**

Through payment of this lump sum, the retirement pension and other insured benefits are reduced accordingly. No additional benefit entitlements will be due after receiving a lump sum payment (e.g. retirement-linked children's pensions, spouse's pensions, partner's pensions, orphan's pensions, etc.).

### **Voluntary buy-ins**

If you have voluntarily bought into a pension fund of an occupational pension scheme in the last three years before retirement, the resulting benefits may not be withdrawn from the pension fund as a lump sum. The Swiss Federal Court judgment of 12 March 2010 on case 2C\_658/2009 ruled that the three-year restriction on lump-sum withdrawals for tax purposes applies to the entirety of the retirement savings, not merely the buy-in benefits. If you should decide to withdraw a lump sum within the three-year period, you can expect to receive a sizeable tax bill.

### **Deadline**

The application (incl. officially certified signature of the spouse/registered partner) must be received by comPlan **no later than one month before (partial) retirement**. It can be amended or recalled up to one month before (partial) retirement. If the original lump sum withdrawal percentage is amended, the spouse must co-sign the amendment. This signature must be officially certified again.

If you are not married or in a registered partnership, we require a current proof of civil status from the competent authority (not older than three months) before payment is made. You are obliged to notify us of any changes in marital status before the lump-sum payment is made.

### **Validity**

In the event of partial retirement, this application for payment of retirement benefits as a lump sum is **only valid for the upcoming stage of partial retirement**. A new application is required for each of the next stages of retirement, insofar as you wish to receive further lump sum payments. In addition, the specified lump sum payment percentage relates solely to the upcoming stage of partial retirement. For example, if you are reducing your workload from 100% to 70%, i.e. entering into 30% partial retirement, and would like to withdraw half of the retirement benefits as a lump sum on partial retirement, please enter 50% as the lump sum payment percentage.

The payment of retirement benefits as a lump sum is contingent on the legal and regulatory principles valid at the time of retirement permitting the lump sum payment.