

Note for the insured person

When you leave your previous occupational benefits scheme, you are usually entitled to a vested benefit (also called a termination benefit). This credit balance from the occupational benefit scheme (2nd pillar) is made up of your employee contributions, the employer's contributions, any personal purchases, interest, etc. Your vested benefits or part of them may also be held in a vested benefits account or a vested benefits policy.

As you are now insured with comPlan, your vested benefits must by law be transferred to comPlan (in accordance with Art. 3 para. 1 FZG). **Please complete and sign this form and forward it to your previous pension fund to arrange the transfer to comPlan.** After receipt of the credit balance, comPlan will credit the amount to your individual retirement account and send you an updated pension certificate. Interest will be paid on the credit balance from the time you join comPlan at the earliest.

Are your vested benefits with several pension funds? You can find more copies of this form at www.pk-complan.ch/downloads.

Do you not know where your occupational pension assets are? Contact the 2nd Pillar Central Office www.zentralstelle.ch

You only want to transfer the part of your vested benefits to comPlan that is needed to purchase the full regulatory benefits? Get in touch with us.

Personal data

Name First name

Address

AHV number Date of birth

Telephone number

Previous employer (possibly contract number)

or number of the vested benefits account/policy

Transfer order to former pension fund

Please transfer my total vested benefits as follows:

Bank PostFinance AG, 3030 Berne
IBAN CH36 0900 0000 1622 3490 8
In favour of comPlan, Stadtbachstrasse 36, 3012 Berne
Purpose of payment Name, national insurance number, BVG portion of the transfer amount

The previous pension fund is requested to send a copy of the termination statement to comPlan, Stadtbachstrasse 36, 3012 Bern. Many thanks.

Place and date Signature

Please forward this form to your former pension fund