

Request for transfer to another pension scheme

Pillar 3 savings
account no. _____

Pension fund member

Family Name	_____	First Name	_____
Street/No	_____	Postcode/City	_____
Telephone	_____	Country	_____
Date of birth	_____	Marital status	_____
AHV no.	756. _____		

Desired disbursement date max. 3 months in the future _____

Disbursement reason indicating the documents to be submitted¹

- Transfer to another pension fund of Pillar 3a**
 - Copy of the pension agreement of the new 3a pension scheme or confirmation that the account concerns a restricted account or restricted policy of Pillar 3a
- Transfer to pension fund**
 - Payment slip or payment instructions of the pension fund
 - For partial transfer: confirmation of the maximum permissible extent of the purchase
- Divorce² / Assignment to spouse / registered partner due to a change in matrimonial property³**
 - Copy of the legal divorce ruling² / Copy of the certified agreement on the change in matrimonial property³
 - Copy of the pension agreement of the new 3a pension scheme or confirmation that the account concerns a restricted account or restricted policy of Pillar 3a

¹ The Pillar 3 pension foundation of Zürcher Kantonalbank reserves the right to request further documents and evidence.

Security positions and insurance policies

The disbursement request contains the order to the Pillar 3 pension foundation of Zürcher Kantonalbank to sell any security positions in the course of processing this order. If the securities are to be sold immediately, please submit a separate securities order.

An insurance policy associated with the Pillar 3 account will be automatically terminated upon account closure.

Place, Date

Signature of pension fund member

Send to: Vorsorgestiftung Sparen 3 der Zürcher Kantonalbank, Postfach, 8010 Zürich