

Transfer vested benefit

**Notification**

Employer

Details of the insured person

Surname

First name

Date of birth

Social security number

Street, no.

Postcode, town

Account details

Raiffeisenbank Höfe, 8832 Wollerau

Clearing 81356 / PC 90-602-2

IBAN CH63 8135 6000 0073 1679 8, in the name of Inter Pensionskasse, 8832 Wollerau

For the benefit of "Name and social security no. of the insured person"

Required details

Total vested benefit, of which retirement credit balance in accordance with BVG, retirement credit balance with married, retirement credit balance from age 50, housing support capital payment and housing support pledge

Note for new admission

If you were insured during your last employment relationship within the scope of an occupational benefit plan, you are normally entitled to a vested benefit. Please therefore instruct your previous benefit fund or vested benefit fund to generate a full leaving settlement and to transfer the credit balance to which you are entitled to Inter Pensionskasse so that your benefit protection can be maintained or developed further.

Leaving benefit

Insured persons who leave the benefit fund before any benefit has been drawn are entitled to a leaving benefit. The insured person informs his/her previous benefit fund if possible before leaving that the leaving benefit is to be transferred to Inter Pensionskasse. The previous benefit fund is obliged to make this transfer immediately. If a leaving benefit has been transferred to a vested benefit and the person joins Inter Pensionskasse, the person has to notify this admission to the vested benefit fund concerned, which will then transfer the credit balance to Inter Pensionskasse.

Inspection

Inter Pensionskasse has the right to inspect the leaving settlement and to claim the outstanding vested benefits of an insured person with the previous benefit fund.

Information

The insured person is entitled to a leaving settlement from the previous benefit fund. The settlement has amongst other things to provide information on how the vested benefit was calculated and the amount of the BVG retirement credit balance. The benefit fund has to advise the person leaving of all of the legal and regulatory options for obtaining benefit protection. The benefit fund has to provide the insured person at any time with information on the amount of the regulatory vested benefit and the BVG retirement credit balance.

Delivery

This form is to be submitted as quickly as possible to the previous employer for the attention of its employee benefit fund.

Town

Date

Insured person
