Application for capital payment

(in accordance with Art 37, para. 4, 5 BVG and Art 9c of the benefit regulations)

Inter Pensionskasse

Details about the agreement

Company

Details about the applicant

Surname | First name

Date of birth | Social security number

Street, no. | Postcode, town

Civil status

☐ single ☐ married ☐ divorced ☐ widowed ☐ registered partnership ☐ dissolved partnership

Declaration

I am applying to obtain the old age benefit (or a part of it) which is due upon reaching retirement age as a one-off capital payment.

I would like the payment of a part of the old age benefit ☐ Yes Portion in CHF or %

I would like the payment of the whole old age benefit in the form of capital ☐ Yes

Please note

The portion of the old age benefit which is not drawn will be converted in accordance with the provisions of the benefit regulations into an old age pension with reversionary survivor pensions.

Provisions

With the capital withdrawal the regulatory claims with Inter Pensionskasse for old age pension, retirement child benefit, spouse / partner pension and orphan pensions are settled proportionately.

Partial disability

With partial invalidity the maximum portion of the old age benefit which can be obtained in the form of capital is in accordance with the degree of the inability to work, and the minimum portion must be in accordance with the degree of the ability to work in accordance with the BVG (Federal Occupational Retirement, Survivors' and Disability Pensions Act).

Total disability

With total disability a capital payment can only be made if the insured person was still fully or partially able to work three years before retirement age.

Town | Date | Signature of the insured person

Town | Date | Signature of the spouse / partner

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