

Vested Benefits Foundation of UBS AG
P.O. Box
CH-8098 ZurichVested benefits account

Transfer to a pension fund or vested benefits foundation

Personal data of pension account holder¹_____
Last name_____
First name(s)_____
Street, no._____
Postal code, city_____
Date of birth (dd.mm.yyyy)_____
AHV number / Social security number (756.xxxx.xxxx.xx)_____
Phone no.

Transfer reason (specifying the documents that must be submitted)

In principle, the pension account holder is legally obligated to transfer the vested benefits into the pension fund (art. 3 para. 1 FZG/VBA). The transfer to a vested benefits foundation is only allowed if it is not possible to make a transfer to the current pension fund.

On receipt, the processing time may be up to 20 working days. The documents submitted will not be returned. Copies are accepted.

☐ **Transfer to a pension fund****The QR-bill (payment slip) of the pension fund must be included.**☐ Full balance☐ Partial transfer: current confirmation of purchase (incl. maximum amount) or current pension fund statement_____
Name of pension fund_____
Starting date at new employer_____
Employer / Reference / Contract number / Personal number☐ **Transfer to a vested benefits foundation in Switzerland (vested benefits account or policy)**_____
Name of vested benefits foundation

- Account opening confirmation of the new vested benefits foundation
- QR-bill (payment slip) / bank details of the new vested benefits foundation

☐ **Divorce / Legally dissolved partnership**

- Copy of a legally binding Swiss divorce decree / Swiss dissolution judgement
- QR-bill (payment slip) / bank details of vested benefits foundation / pension fund of the ex-partner

UBS Vitainvest Funds / CSA Mixta-BVG investment groups

Investments in securities will be sold in the required amount by the transfer date. A separate securities order is required by means of the appropriate form if the investments in securities should be sold immediately, i. e. prior to the transfer date.

The pension account holder hereby

- confirms that this application and the documentation provided are correct and complete.
- authorizes the Vested Benefits Foundation of UBS AG to make any other enquiries that may be necessary.

Place

Date (dd.mm.yyyy)

Signature of pension account holder

¹The singular form also includes the plural, and all masculine terms referring to persons refer to persons of both genders.