

## Request for capital disbursement

Disbursement is subject to tax.

### Pension fund member

Family Name	_____	First Name	_____
Street/No	_____	Postcode/City	_____
Telephone	_____	Country	_____
Date of birth	_____	Marital status	_____
Social security no. 756.	_____	IBAN/Account no	_____

**Desired disbursement date** max. 3 months in the future \_\_\_\_\_

**Disbursement reason** indicating the documents to be submitted<sup>1</sup>

- Reaching ordinary pension age or up to five years earlier
- Disability degree of disability at least 70%
  - Current disposal of the Swiss disability insurance (not older than two years) or current pension calculation indicating the degree of disability
- Commencement of self-employment as the main occupation or commencement of a fundamentally different self-employment in Switzerland disbursement only within one year after commencement
  - Current confirmation of the AHV compensation fund
  - Disposal of the AHV compensation fund for previous self-employment
  - Certified copy of a valid ID of the spouse/registered partner
  - Membership in a pension scheme of Pillar 2  Yes  No
  - Main occupation since: \_\_\_\_\_
- Leaving Switzerland permanently
  - Deregistration confirmation from the Swiss residents registration office
  - If the deregistration date is over three months old, a copy of the domicile confirmation of the current domicile is also required (not older than three months)
  - Certified copy of a valid ID of the spouse/registered partner

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

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Only to be completed by the Pillar 3 pension foundation of Zürcher Kantonalbank

DEP  Ja  Nein WS-DA  Ja  Nein SB: \_\_\_\_\_

### Tax domicile on the disbursement datet

- Domicile in Switzerland tax notification by the Foundation directly to the Swiss tax administration
- Domicile abroad withholding tax is deducted directly by the Foundation

Should doubts persist regarding the tax domicile based on the documents submitted, the Pillar 3 pension foundation of Zürcher Kantonalbank reserves the right to deduct withholding tax upon disbursement.

### Residential address abroad if different from personal details

Street/No \_\_\_\_\_ Postcode/City \_\_\_\_\_  
Telephone \_\_\_\_\_ Country \_\_\_\_\_  
Effective date \_\_\_\_\_

### Transfer account in the name of the pension fund member

Account number or IBAN \_\_\_\_\_  
Account holder \_\_\_\_\_  
Address of the beneficiary \_\_\_\_\_  
(Street, Postcode, City, Country) \_\_\_\_\_  
Bank name or bank clearing number \_\_\_\_\_

### 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.

### Signatures

The disbursement reasons "Commencement of self-employment as the main occupation or commencement of a fundamentally different self-employment in Switzerland" and "Leaving Switzerland permanently" can only be claimed with the written consent of the spouse or the registered partner.

\_\_\_\_\_  
Place, Date Signature of pension fund member

\_\_\_\_\_  
Place, Date Signature of the spouse/registered partner

### Zürcher Kantonalbank Signature(s) checked by relationship manager or signed in their presence

\_\_\_\_\_  
Place, Date Signature of relationship manager

### Send to:

Vorsorgestiftung Sparen 3 der Zürcher Kantonalbank, Postfach, 8010 Zürich