

## Request for transfer to another pension scheme

### Pension fund member

Family Name \_\_\_\_\_ First Name \_\_\_\_\_  
Street/No \_\_\_\_\_ Postcode/City \_\_\_\_\_  
Telephone \_\_\_\_\_ Country \_\_\_\_\_  
Date of birth \_\_\_\_\_ Marital status \_\_\_\_\_  
IBAN/Account no \_\_\_\_\_

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

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

- 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
- Divorce**
  - Copy of the legal divorce ruling
  - 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
- Assignment to spouse/registered partner due to a change in matrimonial property**
  - Copy of the certified agreement on the change in matrimonial property
  - 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

<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:

### 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.

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Place, Date

Signature of pension fund member

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