

Request for transfer to another pension scheme

The transfer will be carried out without any tax effects.

Vested benefits account no. _____

Vested benefits account II no. _____

The request is submitted for (hereinafter referred to as the «Foundation»)

☐ Freizügigkeitsstiftung der Zürcher Kantonalbank

☐ Freizügigkeitsstiftung II der Zürcher Kantonalbank

Personal data of pension fund member

Last name _____ First name _____

Street, no. _____ Postcode, town _____

Telephone _____ Country _____

Date of birth _____ Marital status _____

AHV no. 756. _____

Joined the new pension fund by _____

Disbursement reason indicating the documents to be submitted¹

☐ Transfer to another vested benefits foundation

– Payment slip or payment instructions of the vested benefits foundation

☐ Transfer to pension fund or collective foundation

– Payment slip or payment instructions of the pension fund or collective foundation

– For partial transfer, confirmation by the new pension fund regarding the maximum permissible scope of the purchase,
incl. information on BVG / ÜO shares

¹ The Foundation reserves the right to request further documents and evidence.

Security positions

The disbursement request contains the order to the Foundation 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.

Place, date

Signature of pension fund member

Send to:

Zürcher Kantonalbank «Freizügigkeitsstiftung», Postfach, 8010 Zürich