ZKB
Vorsorgestiftung
Sparen 3

Request for correction/ repayment

Pillar 3 savings account no. _____

Pension fund member

Family Name _____ First Name _____

Street/No _____ Postcode/City _____

Telephone _____ Country _____

Date of birth _____ Marital status _____

AHV no. 756. _____

Correction/repayment Amount in CHF _____

Disbursement reason indicating the documents to be submitted[1]

☐ Tax inspector request repayment made with the current value date
– Request by tax authority (tax certificate of the corresponding year will not be corrected)

☐ Correction for the current year

Transfer account in the name of the pension fund member

☐ Repayment and account posting as "provision contribution for the current year" for the above ZKB Pillar 3 account
The remaining Pillar 3 contribution amount may not be exceeded by the provision contribution.

☐ Repayment for the following account

Account number or IBAN _____

Account holder _____

Bank name or bank clearing number _____

Supplementary description of the error

[1] The Pillar 3 pension foundation of Zürcher Kantonalbank reserves the right to request further documents and evidence.

Security positions

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.

Signatures

The pension fund member confirms that a repayment has not yet been requested from any other pension scheme in accordance with the enclosed request by the tax authority. If a claim for repayment is also submitted to another pension scheme, the sum of all repayments does not exceed the amount according to the request by the tax authority.

Place, Date

Signature of pension fund member

Zürcher Kantonalbank Signature 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

Reset form Print form