

Request for capital disbursement

Disbursement is subject to tax.

From the time of the first capital withdrawal due to reaching the reference age, purchases into the 3rd pillar are no longer allowed.

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. _____		

Desired disbursement date max. 3 months in the future _____

Disbursement reason indicating the documents to be submitted¹

- ☐ **Reaching reference age** or up to five years earlier
- ☐ **Disability** Recipient of a full disability pension (degree of disability at least 70%)
 - 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 occupation² or commencement of a fundamentally different self-employment³ in Switzerland** disbursement only within one year after commencement
 - Current confirmation of the AHV compensation fund about the self-employment^{2/3}
 - Confirmation of the AHV compensation fund for previous self-employment³
 - 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

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

Tax domicile on the disbursement date

- ☐ 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 _____

Bank name or bank clearing number _____

For transfers to a foreign bank please enclose detailed payment instructions. The transfer will be made in Swiss francs (CHF).

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