

Pictet Individual Pension Foundation (3rd Pillar A)

Account closing or transfer form

Please complete in capital letters and send the original form to:

Pictet Individual Pension Foundation (3rd Pillar A) – Route des Acacias 60 – 1211 Geneva 73

Should you need any assistance, please do not hesitate to contact us:

Tel. 058/323.29.60 – E-mail: pension@pictet.com

Account no.: _____

Account holder ☐ Mrs ☐ Mr

Last name*: _____ First name(s)*: _____

Date of birth*: _____ AVS no.*: _____

Marital status*: _____

Street and no.*: _____ Postal code/City*: _____

Home/mobile tel.*: _____ Work tel.: _____

Email address*: _____

**Required fields*

The account holder confirms that the above location is their tax domicile. If not, the account holder must indicate said domicile below:

PLEASE SUBMIT LEGIBLE COPIES OF ORIGINALS

☐ Reached legal retirement age

- The account may be closed at the earliest five years before retirement age. If the account holder can prove that he continues to be gainfully employed, payment of benefits may be deferred up to five years from the legal retirement age.

☐ Transferring to a pension institution or a tied individual pension account

- New pension account agreement or certificate from the new pension foundation.
- When transferring a portion of benefits to a pension scheme, a document stating the maximum amount of contributions allowed.

☐ Leaving Switzerland for good

- Certificate from the cantonal authorities confirming that you have left Switzerland;
- Certificate of residence from foreign authorities, dated within 90 days;
- Civil status record dated within 90 days. The consent of the spouse or registered partner is required;
- The signature of the spouse or registered partner has to be authenticated by a notary, bank, local authority or our foundation.

☐ Taking up self-employment (this request must be made within the first year of becoming self-employed)

- Certificate of Old-Age and Survivor's Insurance (OASI);
- Written confirmation of full-time self-employment and non-affiliation with a pension scheme;
- Proof that you have become self-employed (registration in the trade register, business plan, rental or purchase of premises, equipment, etc.);
- Civil status record dated within 90 days. The consent of the spouse or registered partner is required;
- The signature of the spouse or registered partner has to be authenticated by a notary, bank, local authority or our foundation.



☐ **Divorce or dissolution of a registered partnership**

- Divorce settlement or deed of dissolution of the registered partnership.

☐ **Death**

- Death certificate;
- Certificate of inheritance;
- Identity document of heirs;
- Will (if there is one).

☐ **Entitlement to full disability benefits (DI)**

- Decision of the Disability Insurance (DI) scheme;

If you wish to use your pension capital to purchase residential property, please use the “Encouragement of home ownership” form.

Transfer instruction

Name of Bank: _____

Address: _____

Account holder: _____

IBAN no.: _____

Account no.: _____

Reference/communications: _____

Amount: ☐ Total ☐ Partial: CHF _____

Date of withdrawal: _____

A partial payment is authorised only when buying into a pension institution, in the event of divorce or dissolution of the registered partnership.

Following the acceptance of my application by the Pictet Individual Pension Foundation (3rd Pillar A), I agree to the shares in my portfolio(s) being sold. A period of at least 4 working days is necessary to execute the transfer of funds.

I declare that the information provided above, together with any supporting documents enclosed herewith, are true and complete. I authorise the Pictet Individual Pension Foundation (3rd Pillar A) to proceed with any additional verification required.

Date: _____ Signature of
account holder: _____

Date: _____ Signature of spouse/
registered partner: _____

