

Application for cash payment

Settlement No. (if known) _____

1. Personal details

Surname, first name _____

AHV number _____

Marital status _____

Nationality _____

2. Reason for payment

- ☐ a) The termination benefit is less than one year's contribution by the employee
- ☐ b) Taking up self-employment as the main source of income and no longer being subject to subject to the compulsory occupational pension scheme
- ☐ c) Permanent emigration abroad

3. Required documents

To be submitted in all cases:

- ☐ *Married couples, couples legally separated or persons in a registered partnership:*
Termination benefit up to CHF 5,000: Signed consent from the partner (see page 2)
Termination benefit between CHF 5,000 and CHF 20,000: Additionally, a copy of the partner's ID or passport
Termination benefit in excess of CHF 20,000.–: Consent of the partner by means of a certified signature (see page 2)
- ☐ *Unmarried persons (single, divorced, widowed) with a termination benefit of CHF 20,000 or more:*
 current civil status certificate (available from the city or local council or the registry office)

When taking up self-employment:

- ☐ Confirmation from the AHV equalisation fund that you are registered as self-employed

Note: If the confirmation from the AHV compensation fund regarding self-employment is not yet available, submit a copy of the AHV registration form and the business plan in its place.

Level of employment as a self-employed person: _____ %

Additional employment subject to compulsory BVG coverage ☐ yes ☐ no

In the event of permanent emigration abroad:

- ☐ Confirmation of deregistration from the Residents' Registration Office
- ☐ *Cross-border workers:* Confirmation of surrender of cross-border worker permit
- ☐ *When leaving for an EU/EFTA country:* Proof of social security cover from the BVG Guarantee Fund
 Please contact: BVG Security Fund, Head Office, PO Box 1023, 3000 Bern 14

4. Payment details

(Please enclose a payment slip, if available)

Postal / bank account

Name of the bank or post office

Address

Account holder

IBAN

SWIFT (international payment)

Moving abroad

New address abroad, postcode, town and country

Date of departure

Contact person in Switzerland

Tel. no.

If **you are moving to an EU/EFTA country** and remain insured under the occupational pension scheme, only the non-mandatory portion can be paid out. A vested benefits account must be opened for the mandatory portion:

☐ Opened with a Swiss bank

Name of the bank

Address

Account holder

IBAN

☐ Opening of a vested benefits account with the Substitute Occupational Pension Fund via PAT BVG

Please also refer to the enclosed brochure from the BVG Security Fund.

5. Signature of spouse / registered partner

The undersigned spouse or registered partner consents to the cash payment of the vested benefits.

If the termination benefit exceeds CHF 20,000, the original signature must be certified below by the local authority of the place of residence or by a notary.

Place and date

Signature of the spouse / registered partner

Certification

6. General Terms and Conditions

Upon returning to Switzerland, the insured person must, where applicable, repay the vested benefits paid out or – if this is no longer possible – bear the cost of the repurchase themselves. PAT BVG does not provide benefits for a repurchase at any time.

7. Confirmation

The applicant confirms that

- the information provided is complete and correct,
- he has taken note of the general terms and conditions,
- he has not made any top-ups in the last three years,
- if the cash payment is made as a result of moving abroad, he is permanently ceasing his gainful employment in Switzerland and leaving the country for good
- is aware that, in the case of a cash payment abroad, withholding tax will be deducted for amounts exceeding CHF 5,000
- if the cash payment is made as a result of taking up self-employment, that this is carried out **as their main occupation**.

Place and date

Signature of the applicant

**Pension Fund
for Doctors and Vets PAT-BVG**

Pension Department

PAT BVG
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