JJS | SMARTER PENSION SOLUTIONS

Johann Jakob Sulzer Stiftung
Zürcherstrasse 12, 8400 Winterthur
www.jjs-stiftung.ch

FORM FOR INSURED PERSONS

Application for lump-sum payment of retirement capital on retirement

Personal details

Last name and first name

Personnel no.

Street

Tel. private

Postcode / town

E-mail private

Marital status ☐ Married / registered partnership ☐ Other marital status

Are you unable to work as a result of illness/an accident? ☐ Yes ☐ No

If you answered yes, has the Federal Disability Insurance been notified? ☐ Yes ☐ No

Address at time of retirement

Street

Postcode / town

Country

Please note: Insured persons who do not have a place of residence in Switzerland when the capital is paid out are subject to withholding tax.

Retirement date (DD/MM/YYYY)

Amount of lump-sum payment

in CHF ______ in percent ______ %

Payment address

(Note: This must be a private account in the insured person's name)

Name/address of bank/post office

IBAN no.

BIC/SWIFT address (outside Switzerland)

The insured person is aware that

- this application becomes effective three months before the retirement date and cannot be revoked.
- if voluntary deposits have been purchased, the resulting benefits cannot be withdrawn as a lump sum in the following three years (art. 79 para. 3 BVG); the amount paid in for such deposits, including interest, must be taken as a retirement pension.
- a lump-sum payment of part of the retirement capital reduces the retirement pension proportionately to the amount withdrawn. The spouse's pension is 60% or 100% of the current retirement pension at the time of death (JJS Pension Fund Regulations art. 33 para. 1 with reference to Pension Plan).
- a payout of all retirement capital in cash (lump-sum payment) instead of a retirement pension excludes all further claims on JJS.
- the JJS Pension Fund Regulations and Pension Plan applicable at the retirement date are authoritative.
- JJS does not clarify the tax implications of a lump-sum payment. It is up to the insured person to obtain independent advice in good time and to clarify the situation with the responsible Swiss and/or foreign tax authorities; the insured person bears liability for tax claims. JJS does not accept any responsibility for tax implications.

Marital status (mandatory for lump-sum payments of CHF 20’000 and above)

☐ **married / registered partnership**

Notarisation of signature of spouse / registered partner by a notary’s office. Note: The certified signature must not be more than six months old at the retirement date. Notarisation by the municipality is not sufficient.

☐ **Other marital status**

Please attach an up-to-date certificate of marital status **Personenstandsnachweis** – in copy – (official document). Note: This document must not be more than 6 months old at the retirement date. Confirmation of place of residence is not sufficient.

Signatures

The insured person – and, if he/she is married/has a registered partner, his/her spouse/partner – must sign this form to confirm that the details are correct and he/she has understood the contents.

Place/date

Signature of the insured person

Consent of spouse / registered partner

I agree to the lump-sum payment of CHF ______ i.e. ______ % of the retirement capital.

Last name and first name

Place / date

Signature of spouse / registered partner

Notarisation of signature of spouse / registered partner by notary’s office
(valid for page 1/2 and page 2/2)

Issuer / place of issue

Date / signature / stamp

Please send the completed form with a legally binding signature and the relevant documents to Johann Jakob Sulzer Stiftung, Postfach, 8401 Winterthur **at the latest 3 months before your retirement date**.