

## Application for lump-sum payment of retirement capital on retirement

Please send the completed form with a legally binding signature and the relevant documents to Sulzer Vorsorgeeinrichtung, P.O. Box, 8401 Winterthur **at the latest 3 months before your retirement date.**

### Personal details

Last name / First name \_\_\_\_\_ Personnel no. \_\_\_\_\_

Address \_\_\_\_\_

Marital status  Single  Married/registered partnership  Widowed  Divorced

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 \_\_\_\_\_

**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.

Your phone no. / email address for queries \_\_\_\_\_

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- if voluntary deposits have been purchased, the resulting benefits cannot be withdrawn as a lump sum in the following three years (art. 79 para. 3 BVG); the amount paid in for such deposits, including interest, must be taken as a retirement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- a lump-sum payment of part of the retirement capital reduces the retirement pension proportionately to the amount withdrawn.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 (SVE Pension Fund Regulations art. 35 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 Sulzer Vorsorgeeinrichtung.
- the SVE Pension Fund Regulations and Pension Plan applicable at the retirement date are authoritative.
- SVE 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. SVE does not accept any responsibility for tax implications.

**Mandatory for lump-sum payments of CHF 20,000.00 and above**

Marital status  Single

- Please attach an up-to-date certificate of marital status «*Personenstandsnachweis*» (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.

Married, registered partnership

- Officially certified signature of your spouse/registered partner.

Please note: The certified signature must not be more than six months old at the retirement date.

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**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

\_\_\_\_\_  
First name

\_\_\_\_\_  
Place / date

\_\_\_\_\_  
Signature of spouse / registered partner

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**Official certification of spouse's / registered partner's signature:**

(Valid for page 1/2 and page 2/2)

Issuer / Place of issue

Date / Signature / Stamp