

## Lump-sum withdrawal on retirement

Company \_\_\_\_\_

Policy no. \_\_\_\_\_

Plan \_\_\_\_\_

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

Street/no. \_\_\_\_\_ Postcode, town/city \_\_\_\_\_

NI no. 756. \_\_\_\_\_ Date of birth \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

I hereby declare that I wish to receive a lump sum rather than a retirement pension on retirement.

I acknowledge that

- Such a lump-sum withdrawal entails the loss of entitlements to
  - Pensioner's child's pensions
  - Spouse's/partner's pensions
- The retirement pension may only be withdrawn as a lump sum with the written consent of my spouse/registered partner
- Retirement benefits arising from purchases may not be withdrawn as a lump sum within three years of said purchases without incurring adverse tax consequences (no such problems apply if the pension option is chosen)

I have made purchases for missing contribution years or early retirement in the last three years

no  yes (if yes, please provide details below)

Amount in CHF \_\_\_\_\_ Date \_\_\_\_\_

Place and date

Signature of insured party

\_\_\_\_\_