





### Retirement benefits in the form of a lump-sum:

The application for a lump-sum payment must be submitted to the GastroSocial Pension Fund in writing **within 30 days of the actual retirement date at the latest**, but at least before the first pension payment. **We recommend that you submit the application at an early stage before your retirement.** If you miss the specified deadline, only a retirement pension can be paid (subject to Art. 6.3 of the Regulations).

**Please have the following information confirmed by the corresponding office.**

#### Confirmation of residence

Street, Number:

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Postcode, Town/City:

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is confirmed by the municipality of residence.

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**Place and date**

**Stamp and signature of municipality of residence**

#### If not married or living in a registered partnership

##### Confirmation of civil status

single       divorced       widowed

Please provide confirmation from the Citizens' Registry Office in your municipality of residence or enclose a current civil status certificate (a corresponding official document), which can be obtained from your municipal office. The official documents must be no older than 3 month.

The civil status of the insured person is confirmed by the Citizens' Registry Office/public office.

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**Place and date**

**Stamp and signature of Citizens' Registry Office/public office**

#### If married or living in a registered partnership

##### Certification of signature

married       living in a registered partnership

The spouse or registered partner has to consent to a lump-sum withdrawal in writing. The undersigned spouse or registered partner hereby declares that he/she consents to the lump-sum payment of the retirement capital. **The partner's/spouse's original signature must be confirmed by the Citizens' Registry Office in the municipality of residence or certified by a public notary.**

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**Place and date**

**Signature of spouse or registered partner**

The partner's/spouse's signature is confirmed by the Citizens' Registry Office or witnessed by a public notary.

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**Place and date**

**Stamp and signature of Citizens' Registry Office/notary public**

With my signature I confirm that I have taken into account the Regulations and have completed the application form truthfully.

Place and date

Signature of the insured person

#### In the case of semi-retirement, please note:

- 1 The application for a semi-retirement must be submitted at the latest 30 days after the reduction of the working hours.
- 2 An insured can take semi-retirement. The first semi-retirement step can be made before or after the regular retirement age, provided that the conditions of Art. 9.4 and Art. 9.5 of the Regulations are met. Full retirement must be taken on the 70<sup>th</sup> birthday at the latest.
- 3 Semi-retirement presupposes a corresponding reduction in the insured's percentage of working hours and earned income. Semi-retirement is not possible for insured persons who have a claim to disability benefits from the GastroSocial Pension Fund or who have applied for disability benefits from the Federal Disability Insurance.
- 4 The residual degree of employment must be at least 20%. If the remaining annual salary is below the minimum salary pursuant to Art. 2 para.1 BVG, the full retirement benefit must be withdrawn, subject to Art. 2 para. 1bis FZG.
- 5 Semi-retirement can be taken in a maximum of three steps, whereby each reduction must equal at least 20% of the full number of working hours. At least one year must pass between the individual steps.
- 6 If the number of working hours is increased again after semi-retirement was taken, the GastroSocial Pension Fund reserves the right to reduce the retirement benefits by the same ratio as the increase of working hours or to cancel the semi-retirement.
- 7 The retirement assets required to pay the retirement benefits comprise the same percentages of mandatory and extra-mandatory benefits as the total retirement assets.
- 8 The retirement benefit can only be claimed as a pension or as a lump-sum payment for the individual semi-retirement steps. Art. 9.2 of the Regulations applies in all other respects.
- 9 Please note that the GastroSocial pension fund does not guarantee the tax deductibility of the lump sum payment and does not take care of any clarifications. If you have any questions please consult the responsible tax authority.

#### Important

- For early retirement, please enclose a copy of the notice of termination of employment from your workplace.
- For semi-retirement, please enclose copies of your previous and new employment contracts.
- With your signature you confirm that upon early retirement you are not drawing any daily benefits from the health/accident insurance or any disability pension and that no application with the Federal Disability Insurance is pending.