

## Transfer of pension fund assets (termination benefits)

You have a new employer who is not affiliated with the GastroSocial Pension Fund and wish to transfer your pension fund assets to a new pension fund. Or you wish to transfer your pension fund assets to a vested benefits account because you do not work in Switzerland at present or your salary is not subject to pension fund contributions.

To enable us to process your request as quickly as possible, we need the following information:

### 1. Your personal data

Last name: \_\_\_\_\_

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

AHV number:

7 5 6 . . . . .

Date of birth: \_\_\_\_\_

#### Your current address:

Street, Number: \_\_\_\_\_

Postcode, Town/City: \_\_\_\_\_

Country: \_\_\_\_\_

#### For enquiries:

Telephone: \_\_\_\_\_

E-Mail: \_\_\_\_\_

#### Your current marital status:

single     divorced     widowed     legally dissolved partnership

married (date of marriage): \_\_\_\_\_

registered partnership (date of registration): \_\_\_\_\_

### 2. Last employer who was affiliated with GastroSocial

Name of last employer: \_\_\_\_\_

Address of last employer: \_\_\_\_\_

Leaving date: \_\_\_\_\_

#### Note

You can find your **AHV number** on your AHV card or your health insurance card and on all personal documents sent to you by GastroSocial.

### 3. Where should we transfer your pension fund assets?

Please tick as appropriate and provide additional information:

**A:**  **Transfer to a new pension fund**

Name of new pension fund: \_\_\_\_\_

\_\_\_\_\_

Contract or reference number: \_\_\_\_\_

\_\_\_\_\_



Please enclose a payment slip or a letter from the new pension fund providing the details for the transfer.

New employer: \_\_\_\_\_

Address: \_\_\_\_\_

**B:**  **Transfer to a vested benefits account/policy**

Name of bank or vested benefits foundation: \_\_\_\_\_

\_\_\_\_\_



Please enclose a copy of the account opening confirmation from the bank or a statement for the vested benefits account.

**Transfer to a vested benefits account with the Substitute Occupational Benefit Institution**

#### Declaration to A

You have a new employer who is not affiliated with GastroSocial.

#### Note

You can obtain the contract or reference number from your new pension fund or your new employer.

#### Declaration to B

You do not work in Switzerland at present or your salary is not subject to pension fund contributions.

### 4. Your signature

Place, date

Signature

### What happens next?

Once we have received your complete documents, we **usually make the transfer within 30 days**. You will receive a statement of departure as confirmation of payment.

#### Information

The termination benefits equal the amount of your accrued pension fund assets upon departure from the pension fund. The vested benefits consist of the retirement credits, previous pension fund assets brought into the fund, any purchases you may have made, and interest.

If you change jobs, you are personally responsible for ensuring that your assets are transferred to the new pension fund.