

Form for active insured persons

Transfer of vested benefits

Please complete the «Insured person» fields of the form and then send it to your previous pension fund/vested benefits institution.

Insured person

Last name: _____		First name: _____
Street name, no.: _____		
Postcode: _____	City: _____	Country: _____
Date of birth: _____		Insurance no.: _____
Tel. no.: _____		E-mail address: _____

To be completed by the previous pension fund/vested benefits institution

Please complete the form and send it with a copy of the final benefits statement to: Pension Fund of the Siemens Companies in Switzerland, Freilagerstrasse 40, 8047 Zurich.

a) Vested benefits

Vested benefits to be transferred:	CHF: _____
– of which retirement assets under the BVG:	CHF: _____
Vested benefits accrued by age 50:	CHF: _____
Vested benefits at the time of marriage on (date): _____	CHF: _____
– of which retirement assets under the BVG:	CHF: _____

b) Pledging

Has entitlement to occupational benefits been pledged? ☐ Yes ☐ No

If yes:

Amount in CHF: _____ Date of pledge: _____

Pledgee: _____

→ Please enclose a copy of the notice of pledge.

c) Early withdrawal

Has the insured person made an early withdrawal of part of their vested benefits?

☐ Yes ☐ No

If yes:

(All amounts in CHF)

☐ Early withdrawal for home ownership*

Outstanding amount:

Drawn on (date):

Of which BVG:

Retirement assets before
early withdrawal:

☐ Early withdrawal as a result of divorce

Drawn on (date):

Outstanding amount:

Of which BVG:

* Please enclose copies of detailed documents.

d) Voluntary purchases of additional benefits

Has the insured person made voluntary purchases in the last three years?

☐ Yes ☐ No

If yes:

Purchase date:

Amount in CHF:

Purchase date:

Amount in CHF:

Purchase date:

Amount in CHF:

Contact person

Last name:

First name:

Tel. no.:

E-mail address:

Place/date

Stamp and signature

Our bank account details

Zürcher Kantonalbank, Zurich

IBAN: CH96 0070 0114 8080 2087 2

Pensionskasse der Siemens Gesellschaften
in der Schweiz, 8047 Zürich