

Application for payout – portable benefits policy

Policy number

Personal details

First name

Name

Address

Date of birth

AHV number (Swiss social security)

Marital status

Required documents

Reason for disbursement

<ul style="list-style-type: none">• Payment slip of the new pension fund	Transfer to a new pension fund
<ul style="list-style-type: none">• Signatures of the spouse/registered partner and the insured person• A copy of a valid identity card (both sides) or a valid passport (showing signature) of the spouse/registered partner and the insured person• For unmarried persons: proof of current marital status• For payout amounts of CHF 20,000 or more: Authentication of the signatures	Retirement (at the earliest 5 years before reaching the statutory BVG retirement age)
<ul style="list-style-type: none">• Signatures of the spouse/registered partner and the insured person• A copy of a valid identity card (both sides) or a valid passport (showing signature) of the spouse/registered partner and the insured person• Deregistration confirmation from the local authority• For unmarried persons: proof of current marital status• For payout amounts of CHF 20,000 or more: authentication of the signatures	Permanent departure from Switzerland and Liechtenstein subject to Art. 25f FZG
<ul style="list-style-type: none">• Signatures of the spouse/registered partner and the insured person• A copy of a valid identity card (both sides) or a valid passport (showing signature) of the spouse/registered partner and the insured person• Confirmation of the AHV compensation fund regarding self-employment• For unmarried persons: proof of current marital status• For payout amounts of CHF 20,000 or more: authentication of the signatures.	Taking-up of self-employment (possible within 1st year); the pension holder declares that he/she is carrying out the self-employed activity as his/her main occupation.

- Signatures of the spouse/registered partner and the insured person
- For payout amounts of CHF 20,000 or more: authentication of the signatures
- A copy of a valid identity card (both sides) or a valid passport (showing signature) of the spouse/registered partner and the insured person
- For unmarried persons: proof of current marital status
- Current IV decision (not older than 6 months)

Drawing of a **full** disability pension under the Federal Disability Insurance

Account and customer details for a cash payout

IBAN

Account holder

Address of account holder

Your telephone

Your email

Do the details relate to an account abroad? If so, please also complete the following lines.
IBANs for accounts abroad do not begin with "CH".

BIC

Bank name and address

Place, date

Place, date

Signature of the insured person

Signature of the spouse/registered partner

Official authentication of the signatures by the notary or the local authority or a private authentication of the signatures by a Baloise employee (general agency or Head Office)

Place, date

Stamp/signature of the certifying authority

Baloise Life Ltd

Aeschengraben 21
P.O. Box
4002 Basel
Customer Service 00800 24 800 800
customerservice@baloise.ch
baloise.ch