

Application for payout – portable benefits policy

Policy number

1. Personal details

Name and address

Date of birth

AHV number (Swiss social security)

Marital status

2. Required documents

Reason for disbursement

- | | |
|---|---|
| <ul style="list-style-type: none"> → Payment slip of the new pension fund | <ul style="list-style-type: none"> <input type="radio"/> 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 20'000.00 or more: Authentication of the signatures | <ul style="list-style-type: none"> <input type="radio"/> 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 20'000.00 or more: authentication of the signatures | <ul style="list-style-type: none"> <input type="radio"/> 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 20'000.00 or more: authentication of the signatures. | <ul style="list-style-type: none"> <input type="radio"/> 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
 - A copy of a valid identity card (both sides) or a valid passport (showing signature) of the spouse / registered partner and the insured person
 - Current IV decision (not older than 6 months)
 - For unmarried persons: proof of current marital status
 - For payout amounts of CHF 20'000.00 or more: authentication of the signatures
- Drawing of a full disability pension under the Federal Disability Insurance

3. 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
Signature of the insured person

Place, date
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