

## APPLICATION FOR LUMP-SUM PAYMENT AT RETIREMENT

pursuant to Art 24 para 6 of the Pension Fund Swiss Re Regulations

At retirement, you can have up to 100% of the available savings capital in the Pension Plan and the ER Account paid out as a lump sum in cash.

The following conditions apply:

- You need to apply for the cash payment at least two months before you retire.
- Thereafter, your application is final and cannot be revoked.
- Art 79b para 3 of the Swiss Occupational Pensions Act (BVG) prohibits us from paying out in cash, with interest, any buy-ins you made less than three years before leaving the Pension Fund Swiss Re. This portion of your retirement assets you will have to draw as a pension.
- If you are married or in a registered partnership, your spouse or registered partner's signature on this form below must be notarised by a notary public or your municipal council or a Swiss embassy or consulate abroad. Unfortunately, we are not authorised to accept signatures notarised by foreign notaries or governments. Alternatively, your spouse or registered partner can sign this form in person at the Pension Fund Swiss Re offices upon presenting their passport or ID card.
- If you are neither married nor in a registered partnership, you are required, if a Swiss citizen, to enclose with this form current proof of your unmarried status (Zivilstandsnachweis, issued no more than two months prior), which you can apply for at the civil register office (Zivilstandsamt) of your place of origin (Heimatort). If you are not a Swiss citizen, you are required to enclose current proof of your unmarried status (Zivilstandsnachweis, issued no more than two months prior).
- If you receive a partial disability pension, the lump-sum payment will include only the active portion of your pension benefits not linked to the disability pension.
- If you receive a full disability pension, you are not entitled to any lump-sum payment.
- If you take partial retirement, your lump-sum payment will be limited to 100% of the retirement savings capital payable upon partial retirement.
- If you take partial retirement with a lump-sum payment (irrespective of the interest rate applicable to the full savings capital), your retirement will be effected in two phases.

**Please return the form below completed and signed to us in the original (co-signed by your spouse or registered partner, if applicable, and their signature duly notarised), either by post to Pension Fund Swiss Re, Mythenquai 50/60, 8022 Zurich, or via internal mail to Pension Fund Swiss Re, L124.**

Please also enclose the following supporting documents:

If you are unmarried: current proof of your unmarried status (Zivilstandsnachweis, issued no more than two months prior).

**APPLICATION FOR LUMP-SUM PAYMENT AT RETIREMENT**

	Pension Fund member ("the insured")
First name, last name	
Street address	
Postcode, town	
Date of birth	
Marital status	
AHV number (as shown on your employee badge)	

Please select the appropriate box below for the lump-sum payment you are applying for Lump-sum payment from Pension Plan (every insured is covered by the Pension Plan)

Maximum ( 100%)

Portion thereof, in CHF  or as a percentage  % , remaining retirement benefit as a partial life pension

Amount of annual retirement pension in CHF  , remaining retirement benefit as a partial lump sum

**Lump-sum payment from ER Account (available only if you made voluntary buy-ins for early retirement)**

Maximum (100%)

Portion thereof, in CHF  or as a percentage  % , remaining retirement benefit as a partial life pension

Amount of annual retirement pension in CHF  , remaining retirement benefit as a partial lump sum

By signing below, I  certify that all information provided on this form is correct and complete and that I duly note the applicable legal and regulatory provisions.

Place

Date

Insured's signature

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**Consent of spouse or registered partner**

I hereby consent to the leaving benefits being paid out in cash

First name, last name

Place and date

Signature of spouse or registered partner

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**Signature officially notarised:**

If notarised in Switzerland: signature witnessed by a notary public or municipal council official or provided in person at the Pension Fund Swiss Re offices upon presentation of passport or ID card. Please arrange an appointment in advance.

If notarised abroad: Swiss embassy or consulate.

Place and date

**Official stamp and signature**

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