

The independent pension platform

## Standing Order (3<sup>rd</sup> Pillar)

**Client  
particulars**

Title  Mr  Mrs/Ms hereafter referred to as "the Client" Date of birth

Name First name

Street, N° Postal code, place

I wish to make use of this free service. By signing this 3<sup>rd</sup> pillar standing order, the desired sum will be transferred with the desired frequency from my personal bank account with:

Bank Address

Contact person

Please record the standing order, in accordance with the attached payment slip, to the debit of my account N° \_\_\_\_\_

in favour of my retirement savings account N° \_\_\_\_\_ with Liberty Foundation for 3a Retirement Savings (to be completed by the Foundation)

**Execution date**

on each \_\_\_\_\_

first payment \_\_\_\_\_

last payment \_\_\_\_\_  until further notice

**Periodicity**

monthly  quarterly  six-monthly  yearly

**Amount**

I wish to save the maximum permissible amount.

The standing order automatically transfers the maximum permissible annual contribution to your retirement savings account. This ensures that no 3<sup>rd</sup> pillar payments are forgotten and that you benefit from the maximum authorised tax deduction set each year.

I wish to transfer the maximum contribution this year.

Please transfer the corresponding difference debiting my above-mentioned account.

I wish to save the maximum permissible contribution minus CHF \_\_\_\_\_

If you already pay a contribution to your 3a retirement savings, only the difference between the amount paid and the maximum permissible annual contribution may be transferred. A 3<sup>rd</sup> pillar standing order is also judicious in this case. This will ensure that you benefit from the maximum authorised tax deduction set each year.

I wish to transfer the maximum contribution this year.

Please transfer the corresponding difference debiting my above-mentioned account.

I wish to regularly save the following amount: CHF \_\_\_\_\_

Please send me a debit notice.

**Signature**

Place, date

Client's signature