

## The independent pension platform

Transfer instructions for existing 3<sup>rd</sup> pillar pension plan

|                                               |                                                                                                                                                                                                                                                          |                    |
|-----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|
| <b>Sender<br/>(Principal/<br/>Client)</b>     | Name                                                                                                                                                                                                                                                     | First name         |
|                                               | Street, N°                                                                                                                                                                                                                                               | Postal code, place |
| <b>3<sup>rd</sup> pillar<br/>pension plan</b> | Name and address of existing 3a retirement savings institution, bank, insurance company                                                                                                                                                                  | Amount             |
| <b>Transfer order</b>                         | I hereby instruct the above-mentioned 3a retirement savings institution, bank or insurance company to transfer funds to my 3a retirement savings account with Liberty Foundation for 3a Retirement Savings in accordance with the attached payment slip. |                    |
|                                               | Please handle any securities as follows (please attach current securities deposit statement):                                                                                                                                                            |                    |
|                                               | <input type="checkbox"/> sell and transfer proceeds of sale in accordance with the payment slip                                                                                                                                                          |                    |
|                                               | <input type="checkbox"/> transfer the securities in accordance with the attached delivery instructions and pay the balance in accordance with the payment slip                                                                                           |                    |
|                                               | As reference, please indicate the Client's name and first name and his insurance number.                                                                                                                                                                 |                    |
| <b>3<sup>rd</sup> pillar<br/>pension plan</b> | Name and address of existing 3a retirement savings institution, bank, insurance company                                                                                                                                                                  | Amount             |
| <b>Transfer order</b>                         | I hereby instruct the above-mentioned 3a retirement savings institution, bank or insurance company to transfer funds to my 3a retirement savings account with Liberty Foundation for 3a Retirement Savings in accordance with the attached payment slip. |                    |
|                                               | Please handle any securities as follows (please attach current securities deposit statement):                                                                                                                                                            |                    |
|                                               | <input type="checkbox"/> sell and transfer proceeds of sale in accordance with the payment slip                                                                                                                                                          |                    |
|                                               | <input type="checkbox"/> transfer the securities in accordance with the attached delivery instructions and pay the balance in accordance with the payment slip                                                                                           |                    |
|                                               | As reference, please indicate the Client's name and first name and his insurance number.                                                                                                                                                                 |                    |
| <b>3<sup>rd</sup> pillar<br/>pension plan</b> | Name and address of existing 3a retirement savings institution, bank, insurance company                                                                                                                                                                  | Amount             |
| <b>Transfer order</b>                         | I hereby instruct the above-mentioned 3a retirement savings institution, bank or insurance company to transfer funds to my 3a retirement savings account with Liberty Foundation for 3a Retirement Savings in accordance with the attached payment slip. |                    |
|                                               | Please handle any securities as follows (please attach current securities deposit statement):                                                                                                                                                            |                    |
|                                               | <input type="checkbox"/> sell and transfer proceeds of sale in accordance with the payment slip                                                                                                                                                          |                    |
|                                               | <input type="checkbox"/> transfer the securities in accordance with the attached delivery instructions and pay the balance in accordance with the payment slip                                                                                           |                    |
|                                               | As reference, please indicate the Client's name and first name and his insurance number.                                                                                                                                                                 |                    |
| <b>Signature</b>                              | Place, date                                                                                                                                                                                                                                              | Client's signature |
| <b>Attachments</b>                            | <ul style="list-style-type: none"> <li>- Foundation payment slip</li> <li>- Delivery instructions (for the transfer of securities to the Foundation)</li> <li>- Current statement of Client's security deposit (for securities transfers)</li> </ul>     |                    |
| <b>Confirmation from the new Foundation</b>   | We hereby confirm that the Client's account with Liberty Foundation for 3a Retirement Savings is a vested benefits account in accordance with Article 82 BVG/LPP and Article 1 BVV3 of the Vesting Law.                                                  |                    |
| <b>Signature</b>                              | Liberty Foundation for 3a Retirement Savings, Schwyz                                                                                                                                                                                                     |                    |
|                                               | Signature of Foundation                                                                                                                                                                                                                                  |                    |