

The independent pension platform

Transfer instructions for existing 2nd pillar pension plan

Sender (Principal/ Client)	Name	First name
	Street, N°	Postal code, place
2nd pillar pension plan	Name and address of existing pension plan/vested benefit institution/insurance company	
	Amount	
Transfer order	I hereby instruct the above-mentioned pension plan, vested benefits institution or insurance company to transfer the vested termination benefit to my vested benefit account with Liberty Foundation for Vested Pension Benefits in accordance with the attached payment slip.	
	<input type="checkbox"/> total amount <input type="checkbox"/> partial CHF amount _____ (not possible for a vested benefit accounts or policies)	
	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.	
2nd pillar pension plan	Name and address of existing pension plan/vested benefit institution/insurance company	
	Amount	
Transfer order	I hereby instruct the above-mentioned pension plan, vested benefits institution or insurance company to transfer the vested termination benefit to my vested benefit account with Liberty Foundation for Vested Pension Benefits in accordance with the attached payment slip.	
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	As reference, please indicate the Client's name and first name and his insurance number.	
Signature	Place, date	Client's signature
Attachments	- Foundation payment slip - Delivery instructions (for the transfer of securities to the Foundation) - Current statement of Client's security deposit (for securities transfers)	
Confirmation from the new Foundation	We hereby confirm that the Client's account with Liberty Foundation for Vested Pension Benefits is a vested benefits account in accordance with Article 82 BVG/LPP and Article 19(1) and (2) of the Vesting Law.	
	Liberty Foundation for Vested Pension Benefits, Schwyz	
Signature	Signature of Foundation	