



tellco

Tellco pkPRO

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pkPRO@tellco.ch

tellco.ch

Transfer of Vested Benefits upon Change of Place of Employment

New pension plan institution

Contract no.

Surname, First name

Insured no.

To facilitate a quick transfer in compliance with the law, the following points must be noted:

As new employer

Please complete the form with the contract number, surname, first name and insured's number and pass it on to your new employee without delay.

You can also find this form on our website at www.tellco.ch under «Forms».

As employee

To make sure that your vested benefits can be transferred to Tellco pkPRO as soon as possible, please send this form to your former employer, your former pension fund or the company's own foundation without delay.

As former employer

Please forward this form to your pension fund (or company-owned foundation).

As former pension fund

Please send the completed form or a corresponding final statement to Tellco pkPRO. Please use the attached payment slip for the transfer of the funds.

Vested Pension Benefit

Total

CHF

of which retirement credit pursuant to the LPP

CHF

At age 50

CHF

At the time of marriage on

CHF

Which was notified to the member for the first time pursuant to the Portable Benefits Act FZG article 24:

Computed as of

CHF

Is the claim pledged on pension benefits?

 Yes No

If yes, who is the secured creditor?

Has the member made an early withdrawal of part of his/her vested benefits?

 Yes No

If yes: Date and amount of the early withdrawal

CHF

Has the insured person made any purchases of benefits in the past three years?

 Yes No

If yes, date

CHF

Others, date

CHF

Place, Date

Stamp and signature of former employer or its pension fund

Tellco pkPRO | PK_07_300_09_d_9 Transfer of Vested Benefits upon Change of Employment

NU3BEF04 09.2012

441.02

Empfangsschein / Récépissé / Ricevuta

Einzahlung für / Versement pour / Versamento per

UBS Switzerland AG
CH-8098 ZürichZugunsten von / En faveur de / A favore di
CH6600273273261401M1YTellco pkPRO
Bahnhofstrasse 4
6430 SchwyzRef:
Konto / Compte / Conto 80-2-2
CHF

Einbezahlt von / Versé par / Versato da

+ Einzahlung Giro +

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CHF

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+ Versement Virement +

Zahlungszweck / Motif versement / Motivo versamento

Einbezahlt von / Versé par / Versato da

+ Versamento Girata +Die Annahmestelle
L'office de dépôt
L'ufficio d'accettazione