

## Mandate to transfer pension plan savings

### Address of previous pillar 3a institution

Name \_\_\_\_\_  
Street, no. \_\_\_\_\_  
Postcode, place \_\_\_\_\_

### Personal details of policyholder (principal)

First name, last name \_\_\_\_\_  
Street, no. \_\_\_\_\_  
Postcode, place \_\_\_\_\_  
Date of birth \_\_\_\_\_

### Mandate to pillar 3a institution

Closure of pension savings account with number \_\_\_\_\_

I hereby authorise you to transfer my pension plan savings from the above pension savings account to my pension savings account at Swiss Life 3a Employee Benefits Foundation. Please quote "transfer 3a-3a" as reason for payment. I am aware that any securities will be sold.

For the account details, please see the enclosed copy of the confirmation of account opening issued by the Swiss Life 3a Employee Benefits Foundation.

The Swiss Life 3a Employee Benefits Foundation confirms that the transfer account specified in the confirmation of account opening is a pension savings account within the meaning of the Ordinance on the Fiscal Deduction of Contributions to Recognised Pension Plans (BVV 3).

\_\_\_\_\_  
Place, date

\_\_\_\_\_  
Signature of policyholder

### Enclosure

- Copy of set-up-confirmation for Swiss Life 3a Employee Benefits Foundation

Please return to your previous pillar 3a institution.

