Johann Jakob Sulzer Stiftung
Zürcherstrasse 12, 8400 Winterthur
www.jjs-stiftung.ch

FORM FOR PENSIONERS

Application for cash payment of retirement capital for IV pension recipients upon reaching the normal retirement age

Personal details

Last name and first name

Personnel no.

Street

Tel. private

Postcode / town

E-mail private

Marital status ☐ Married / registered partnership ☐ Other marital status

Address at time of retirement

Street

Postcode / town

Country

Please note: Insured persons who do not have a place of residence in Switzerland when the capital is paid out are subject to withholding tax.

Retirement date (DD/MM/YYYY)

Amount of lump-sum payment

in CHF

in percent %

Payment address

(Note: This must be a private account in the insured person's name)

Name/address of bank/post office

IBAN no.

BIC/SWIFT address (outside Switzerland)

The insured person is aware that:

- this request becomes legally binding three months before the insured person becomes entitled to retirement benefits, and may no longer be revoked.
- if voluntary contributions have been made, the resulting benefits may not be withdrawn in the form of a lump sum within the next three years (BVG art. 79b para. 3); the purchase amount, including interest, must be withdrawn as a retirement pension. Purchases made before 1 January 2006 are not affected.
- in the event of a partial lump-sum withdrawal, the partial retirement pension shall be reduced proportionally, depending on the amount withdrawn.
  The spouse's pension shall amount to 60% or 100% of the retirement pension in effect at the time of death (art. 33 para. 1 of the JJS Pension Fund Regulations, with reference to the pension plan).
- in the event of a 100% cash payment of the retirement capital instead of a retirement pension, further claims against the Johann Jakob Sulzer Foundation are excluded.
- the JJS Pension Fund Regulations and pension plan valid at the time of retirement shall apply.
- JJS does not investigate the tax implications of lump-sum payments. It is the responsibility of the insured person, who bears the risks for tax claims, to seek independent advice at an early stage and to clarify the matter with the respective Swiss and/or foreign tax authorities. JJS accepts no responsibility for the tax implications of such lump-sum payments.

Marital status (mandatory for lump-sum payments of CHF 20'000 and above)

☐ **married / registered partnership**

Notarisation of signature of spouse / registered partner by a notary's office. Note: The certified signature must not be more than six months old at the retirement date. Notarisation by the municipality is not sufficient.

☐ **Other marital status**

Please attach an up-to-date certificate of marital status **Personenstandsnachweis** – in copy – (official document). Note: This document must not be more than 6 months old at the retirement date. Confirmation of place of residence is not sufficient.

Signatures

The insured person – and, if he/she is married/has a registered partner, his/her spouse/partner – must sign this form to confirm that the details are correct and he/she has understood the contents.

Place/date

Signature of the insured person

Consent of spouse / registered partner

I agree to the lump-sum payment of CHF ______ i.e. ______ % of the retirement capital.

Last name and first name

Place / date

Signature of spouse / registered partner

Notarisation of signature of spouse / registered partner by notary's office
(valid for page 1/2 and page 2/2)

Issuer / place of issue

Date / signature / stamp

Please send the fully completed and legally signed form with the relevant documents to Johann Jakob Sulzer Stiftung, Postfach, 8401 Winterthur, at least 3 months before you become eligible for retirement benefits.