

## Payout of 3a pension account

### Personal details of the pension account holder

Surname	_____	First name (s)	_____
Street, No.	_____	ZIP / City	_____
Country	_____	Birth date	_____
E-Mail	_____	Mobile	_____

Pension account number \_\_\_\_\_

AHV number/social security number \_\_\_\_\_

### Reason for payout (including the documents that must be submitted)

The submitted documents will not be returned. Copies of the documents will be accepted.

Documents in foreign languages must be submitted with a certified translation in German or English.

If the pension assets are pledged, the pledgee (e.g. the bank) must lift the pledge (release of pledge). A copy of the release of pledge must be submitted.

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#### Reaching retirement age

Requirement: Reaching the statutory AHV age or at least five years before reaching the statutory AHV age.

- Copy of passport/ID with signature of pension account holder
- Confirmation of residence (not older than three months on the payout date)
- Proof of civil status (civil status certificate, not older than three months on the payout date)
- Certified signature of spouse or registered partner (if applicable)

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#### Start of self-employment in Switzerland

Requirement: Payout can only be made within one year of starting the main occupation. The legal forms permitted for payout are sole proprietorship and partnership, but not GmbH (Ltd.) and AG (stock companies).

- Copy of the admission order from the AHV compensation fund that you are self-employed as your main occupation
- Wage statement (if you have another occupation)
- Confirmation of residence (not older than three months on the payout date)
- Proof of civil status (civil status certificate, not older than three months on the payout date)
- Copy of passport/ID with signature of pension account holder
- Certified signature of spouse or registered partner (if applicable)

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## Definitive emigration from Switzerland

Requirement: Not being employed or residing in Switzerland. Payout possible at the earliest one month before the date of deregistration from the local municipality.

- Copy of the deregistration confirmation from the Swiss communal registration office with destination information (date of deregistration not older than one year)
- Confirmation of residence with date of moving abroad (not older than three months)
- Proof of civil status (civil status certificate, not older than three months on the payout date)
- Copy of passport/ID with signature of pension account holder
- Certified signature of spouse or registered partner (if applicable)
- I no longer work or live in Switzerland:  
☐ Yes      ☐ No (payout not possible)
- Future country of domicile: \_\_\_\_\_

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## Cross-border commuters: Definitive termination of employment in Switzerland

Requirement: Not being employed nor residing in Switzerland.

- Cancellation confirmation of the cross-border commuter permit
- Proof of civil status (civil status certificate, not older than 3 months on the payout date)
- Copy of passport/ID with signature of pension account holder
- Certified signature of spouse or registered partner (if applicable)
- I no longer work or live in Switzerland:  
☐ Yes      ☐ No (payout not possible)
- Current country of domicile: \_\_\_\_\_

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## Disability

Requirement: Receipt of a full disability pension from the Federal Disability Insurance.

- Current order from the Federal Disability Insurance stating the disability degree (not older than one year)
- Confirmation of residence (not older than three months on the payout date)
- Copy of passport/ID with signature of pension account holder

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## Divorce / legally dissolved partnership

- Newly notarized marriage contract (marital property regime)
- Copy of the final divorce or dissolution judgment (foreign divorce judgments recognized by Swiss court)
- In case of transfer to a Pillar 3a foundation: Confirmation or copy of the pension agreement of the Pillar 3a foundation of the entitled spouse or registered partner
- Confirmation of residence (not older than 3 months on the payout date, from amount 10'000 CHF)
- Copy of passport/ID with signature of pension account holder

## Payment instructions

- ☐ Transfer to my radicant account
- ☐ Transfer to external account

Please only state an account in the name of **pension account holder** (except in the case of divorce/legally dissolved partnership/change of marital property regime)

Name of bank \_\_\_\_\_

IBAN \_\_\_\_\_

In the name of \_\_\_\_\_

For international transfers, please enclose detailed payment instructions (IBAN or SWIFT). The transfer will be made in Swiss francs (CHF).

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## Investment positions

The payout request includes the order to sell any investment positions while processing this request. If the investments are irrespectively to be sold immediately, the pension account holder must initiate the liquidation of all 3a investment positions within the radicant app.

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## Amount and date

- ☐ Payout of entire balance in CHF (incl. balancing of pension account)
- ☐ Partial payout of balance in CHF (only possible in the case of divorce/legally dissolved partnership/change of marital property regime)

Payout amount in CHF \_\_\_\_\_

Preferred payout date \_\_\_\_\_

Note: Processing time can be up to 10 days from receipt. A notice period of 3 months applies.

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## Signature(s)

The pension account holder

- confirms the accuracy and completeness of the information and documents submitted;
- hereby acknowledges any fees that may arise in connection with the withdrawal of the retirement assets in accordance with the Fee Regulations of the Pension Foundation 3a Digital with Asset Management by radicant bank ag, Art 2: [Legal | radicant bank ag](#)
- authorizes the Pension Foundation 3a Digital to make further inquiries.

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PLACE, DATE

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SIGNATURE OF PENSION ACCOUNT HOLDER

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PLACE, DATE

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SIGNATURE OF SPOUSE/REGISTERED PARTNER