Reset

Summary sheet
to be distributed to new members

Maintaining your insurance cover

1

Starting your new employment relationship means that you also became enrolled in your new employer‘s occupational benefits fund.

You are entitled to vested benefits if you had an occupational benefits plan with your previous employer. By law this amount must be transferred to the pension fund of your new employer when you start a new job.

Please note: In order to be able to offer you optimum protection in the event of a benefit case (disability, old age, death), it is essential that you transfer all you Pillar 2 pension assets to the pension fund of your new employer. You can purchase insurance only before a benefit case arises; we are not permitted to accept vested benefits afterwards. This means you should transfer your vested benefits on time or your payments will be significantly lower in the event of a benefit case.

Transferring vested benefits

2

You will need the following details for the transfer:

Contract no. of the new occupational benefits fund:

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Details of the insured:
Surname and first name .....
Insurance number .....
Retirement assets under BVG
Vested benefits at age 50
Vested benefits at the time of marriage/registration of your partnership
Initial calculation of vested benefits
Advance withdrawal, total and BVG portion
Vested benefits before advance withdrawal, total and BVG portion
Pledge
Payout on divorce/dissolution of a registered partnership, total and BVG portion
Partial retirement with pension, date and amount
Partial retirement with lump sum withdrawal, date and amount

Account details for transferring the vested benefits:

Bank	UBS Switzerland AG
IBAN	CH51 0025 7257 1616 4802 V
In the name of	Columna Sammelstiftung Group Invest, Winterthur Winterthur

Please forward this information sheet to your previous employer‘s occupational benefits fund so that it can carry out the transfer.

If you have a vested benefits policy or account, please also instruct the relevant vested benefits institution to carry out an analogous transferral.

Pension fund certificate

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We will recalculate your occupational benefits after we have received your vested benefits and issue you with a new pension fund certificate.

L911.004-09.25 STF H