



Unilever

Pensionskasse Unilever Schweiz

confidential

Leaving - Form *Not to be completed when (early) retiring and/or if you continue to be insured in the pension fund*

Personal data	Family name
	First name
Address	Street, No.
	ZIP, City
	Private e-mail address
Social security no.	
	Date of birth (day / month / year)/...../.....
Marital status	<input type="checkbox"/> single	<input type="checkbox"/> married
	<input type="checkbox"/> separated	<input type="checkbox"/> widowed
	<input type="checkbox"/> divorced	
Termination of employment	 (day / month / year)

1. Are you completely fit for employment?

☐ yes ☐ no

2. How shall vested termination benefits be used? Choose your option!

(only for insured members age 20 and older – there exists no vested termination benefits below age of 20)

2.1 Do you have a new employer in Switzerland?

☐ yes

Then we have to transfer your whole vested termination benefits to your new pension fund.

New pension fund:

Name and address

.....

.....

.....

New employer:

Name and address

.....

.....

.....

► **Please enclose information / payment slip from your new pension fund with IBAN No.!**

2.2 You do not have a new employer yet and you are domiciled in Switzerland?

☐ yes

► **Then you have to open a vested termination benefits account with a Swiss bank!**

Afterwards we will transfer your whole vested termination benefits to your vested termination benefits account.

► **Please enclose information / payment slip from your vested termination benefits account with IBAN No.!**

A later cash payout (as a whole or partly) is always possible. Either to integrate the vested termination benefits in a new pension fund or if there is a reason for a cash payout in line with cipher 2.3 - 2.5.

2.3 You work & live no longer in Switzerland and you are domiciled within EU/EFTA or Liechtenstein?

Then you can choose between 2 options:

2.3.1. Either you let transfer your whole vested termination benefits (compulsory and over-compulsory) to a vested termination benefits account.

☐ yes

- ▶ **Then you have to open a vested termination benefits account with a Swiss bank!**
- ▶ **Please enclose information / payment slip from your vested termination benefits account with IBAN No.!**

2.3.2 Or you choose a cash pay-out of the over-compulsory part of the vested termination benefits (tax at source!); the compulsory part has to be transferred to a vested termination benefits account.

☐ yes

- ▶ **Then you have to open a vested termination benefits account with a Swiss bank!**
- ▶ **Please enclose information / payment slip from your vested termination benefits account with IBAN No.!**

AND

- ▶ **For the cash pay-out of the over-compulsory-part you have to hand in:**

1. IBAN-No. of your private bank account with name, address, BIC/Swift of your bank:

.....
.....

2. Official de-registration (marital status included)

3. Employees married or living in a registered partnership, need the approving signature of their spouse/partner which has to be officially authenticated (please at the end of this template)

2.4 You work & live no longer in Switzerland and you are domiciled outside EU/EFTA or Liechtenstein?

Then you can choose between 2 options:

2.4.1 Either you let transfer your whole vested termination benefits (compulsory and over-compulsory) to a vested termination benefits account

☐ yes

- ▶ **Then you have to open a vested termination benefits account with a Swiss bank!**
- ▶ **Please enclose information / payment slip from your vested termination benefits account with IBAN No.!**

2.4.2 Or you choose a cash pay-out of the whole vested termination benefits (tax at source!).

☐ yes

- ▶ **For the cash pay-out of the over-compulsory-part you have to hand in:**

1. IBAN-No. of your private bank account with name, address, BIC/Swift of your bank:

.....
.....

2. Official de-registration (marital status included)

3. Employees married or living in a registered partnership, need the approving signature of their spouse/partner which has to be officially authenticated (please at the end of this template)

2.5 You will continue to work as a self-employed person and thus not be subjected to a compulsory company pension fund.

☐ yes

► You can choose a cash pay-out of the whole vested termination benefits (taxable) and have to hand in:

1. Confirmation of entry of the AHV-compensation office und information of the self-employment (Business-plan, rental agreement, employment contract, others)
2. IBAN-No. of your private bank account with name, address, BIC/Swift of your bank:

.....

.....

3. Employees married or living in a registered partnership, need the approving signature of their spouse/partner which has to be officially authenticated (please at the end of this template)

2.6 You were maximum 5 months member of Pensionskasse Unilever Schweiz and therefore want to check whether a cash pay-out would be possible?

☐ yes

Condition: vested termination benefit is less than the annual amount of the employee contribution to the pension fund (old age savings).

► Then please contact the pension fund administration.

.....
Location and date

.....
Signature of the former employee

Is the insured person married (or lives in a registered partnership) and requests cash payment (cipher 2.3.2 or 2.4.2 or 2.5) the spouse/partner signature is compulsory. Additionally the spouse's/partner's signature has to be authenticated and original of this form has to be handed in to the Pension fund.

.....
Signature of spouse/partner of a registered partnership

Authentication of signature of the spouse/partner of registered partnership:

► Please hand in:
Pensionskasse Unilever Schweiz, Bahnhofstrasse 19, CH-8240 Thayngen