independent

Retirement Benefits Agreement

The Retirement Benefits Agreement must be completed and signed by the pension account holder and returned to the Independent Vested Benefits Foundation.

Insured member

Surname:	.....	Marital status:	☐ single ☐ married ☐ divorced ☐ registered partnership ☐ widowed
First name:	.....	Marital st. since:	.....
Street:	.....	AHV-No.:	.....
Postcode/Place:	.....	Date of birth:	.....
Country:	.....	Private phone:	.....
Nationality:	.....	E-Mail:	.....

Pension fund regulations and schedule of fees

The provisions of the Pension Fund Regulations and schedule of fees apply to the relationship between the insured member, their survivors and the Independent Vested Benefits Foundation.

By signing this agreement, the insured member confirms receipt and acknowledgment of the two above-mentioned documents and information, which form an integral part of this agreement.

Applicable law and court of jurisdiction

All legal relationships are subject to Swiss law. The court of jurisdiction for all disputes arising from this agreement shall be the Foundation's domicile.

Minimum transfer amount

The termination benefits/vested pension benefits must amount to at least **CHF 100'000.-** and must be transferred to the Independent Vested Benefits Foundation at UBS AG.

.....	.....
Place and date	**Place and date**
.....	.....
Insured member (obligatory):	**Independent Vested Benefits Foundation**

01/25

Intenal use only	*bank advisor* .....
☐ *DL QS* ☐ *DL B/PK* ..... *% AK*	*PEX advisor* .....

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