

**PERSONALVORSORGESTIFTUNG DER  
FELDSCHLÖSSCHEN-GETRÄNKEGRUPPE**

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Bankverbindung  
UBS, Zürich  
BC 230  
IBAN CH75 0023 0230 2161 2301 W

**Buying into the pension fund**

By law, if you change jobs and join your new employer's pension plan, the termination benefits of your previous pension plan as well as any other vested benefits provided by Pillar 2 pension plans must be transferred to the new pension plan (Article 4 para. 2<sup>bis</sup> Swiss Federal Law on the Portability of Benefits/FZG). Since 1 January 2006 such vested benefits must be added to the voluntary buying-in benefits even if they are not subject to the transfer obligation, i.e. irrespective of the change of employment. Moreover, in the case of persons who were formerly self-employed, a defined percentage of the pension capital of the private pension provision plan (Pillar 3a) must be taken into account (Article 60a BVV2). In addition the buying-in options are limited in the case of persons who move here from abroad after 1 January 2006 (Article 60b BVV2).

Furthermore, persons who have taken early retirement and remain employed or subsequently return to employment may only buy into a pension plan provided the retirement savings available to them on the date of their early retirement are factored into the calculation of the requisite purchase sum.

Please note that the benefits cannot be withdrawn in the form of capital within the next three years.

To enable us to calculate a possible purchase sum, therefore, please complete the enclosed declaration and return it to us within the next few days.

Many thanks for your assistance. Please do not hesitate to contact us if you require further information.

Yours sincerely

**Personalvorsorgestiftung der  
Feldschlösschen-Getränkegruppe**

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**Name ....., AHV No. 756.....**

**Declaration / Confirmation**

in respect of

**Buying into the occupational pension plan**

I hereby confirm that,

1.     no vested benefits account or policies exist under occupational pension plan (Pillar 2) scheme
- the following vested benefits accounts/policies exist with occupational pension plans (Pillar 2)  
      (please enclose statements):

Balance / surrender value at 31.12. ....	Name / address of bank / insurance
.....	.....
.....	.....

2.    **Additionally for formerly self-employed persons**

- no retirement savings accounts or policies exist under the Pillar 3a private pension provision plan
- the following Pillar 3a private pension accounts / policies exist (please enclose statements):

Balance / surrender value at 31.12. ....	Name / address of bank / insurance
.....	.....
.....	.....

3.    **Additionally for persons who have moved from abroad**

- I moved from abroad on ..... and
- was formerly insured with a Swiss occupational plan (please enclose insurance certificate and/or calculation of termination benefits)

4.    **Additionally for persons who have taken early retirement**

- I took early retirement on ..... (please enclose a statement from your former occupational pension plan detailing the termination benefits at the time of early retirement)

Place/Date: .....

Signature: .....