

Transfer of my vested benefits to a new pension fund or vested benefits institution



To transfer your vested benefits, please complete this form in full and submit it, signed by you, together with the necessary details and documents.

1. Details of the insured person

IBAN of VBA		Date of birth	
First names		Street / No.	
Surname		Postcode / Town	
AHV number		Email	
Marital status		Telephone no.	

2. Details of the new pension or vested benefits scheme

- ☐ New pension fund (on taking up employment)
☐ Other vested benefits institution

Name of the destination institution	
Address	
Postcode / Town	
IBAN / bank account details	

3. Required details / documents

A confirmation is required from the new pension fund or vested benefits institution, stating the name, address, bank account details or QR payment slip of the new pension scheme. I instruct the HBL Vested Benefits Foundation to calculate my vested benefits as at the reference date and to transfer them to the new pension fund or vested benefits institution specified in point 2. I acknowledge that this transfer does not constitute a payment to me personally, but is a transfer within the pension system and does not, as a rule, trigger any capital gains tax. Once the complete instruction with all necessary details has been received, the transfer will be carried out within approximately 30 days. If any details or documents are missing, the process may take longer.

4. Declaration and signature of the pension scheme member

I confirm that the information I have provided is complete and accurate, and I instruct the HBL Vested Benefits Foundation to carry out the transfer described above.

Place / Date _____ Signature _____

Please send us the transfer form together with all the required documents to the following address:

HBL Freizügigkeitsstiftung
Postfach
5600 Lenzburg