

Transfer of Pillar 3a assets to another pension scheme



To transfer your Pillar 3a savings, please complete this form in full and submit it to us, signed by you.

1. Details of the insured person

IBAN of pension account		Date of birth	
First names		Street / No.	
Surname		Postcode / Town	
AHV number		Email	
Civil status		Telephone no.	

2. Details of the new 3a pension institution

Name of the institution	
Address	
Postcode / Town	
IBAN / Pension account no.	

3. Instructions and notes regarding the transfer

A confirmation bearing two legally valid signatures from the new pension provider is required, stating its name, address and account details, or a QR payment slip from the new pension provider.

I instruct the HBL 3a Pension Foundation to calculate my Pillar 3a assets as at the cut-off date and to transfer them to the new, tax-recognised 3a pension institution specified in point 2.

If my Pillar 3a assets are invested in securities, the existing securities will be sold and the proceeds will be transferred in cash to the new 3a institution.

I acknowledge that a transfer within Pillar 3a does not constitute a payout to me personally and that the tax status of the assets is, in principle, retained. The transfer usually takes place within around 30 days, once the complete instruction and all necessary details have been received. If any details 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 3a Pension Foundation to carry out the transfer described above.

Place / Date _____

Signature _____

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

HBL 3a Vorsorgestiftung
Postfach
5600 Lenzburg