



Announcement for continued insurance after reaching the statutory retirement age
pursuant to Art. 33b LOB

Contracting office:

*Contract no.:

*Policy no.:

*Company:

Street, no.:

Postcode, city:

1 Personal details concerning the insured person

* Last Name:

*First Name:

*Date of birth:

*Street. no.:

*Postcode, City:

2 Important information

- a) Conditions:** The continued insurance after reaching the statutory retirement age is possible, if the insured person
- has reached the statutory retirement age (women: 64, men: 65) and
 - remains employed by the previous employer and
 - draws an annual salary in excess of the entrance threshold according to the regulations and
 - is fully capable of working at the time of registration and
 - submit this form at least one month prior to reaching the statutory retirement age.

- b) Benefits during the continued insurance:**
Disability benefit and the lump sum death benefit are not covered.

In case of death during the continued insurance, the regulations apply: Normally, the following benefits are paid:

- Spouses or partners: 60% of the expected retirement pension at the age of 70;
- Orphans: 20% of the expected retirement pension at the age of 70;
- If applicable, also a restitution of contributions.

- c) Financing:** The contributions will continue to be financed

in line with the existing provisions of the regulations, but at least 50% comes from the employer.

- d) End:** The continued insurance after reaching the statutory retirement age ends
- upon termination of the employment relationship (a termination before reaching age of 70 is to be notified with the form for early retirement)
 - in the event of incapacity for work arising from illness or accident lasting longer than three months.
 - if the insured person falls below the entrance threshold according to the regulations
 - at the latest upon reaching the age of 70

- e) Taxes:** Contributions and purchases in the occupational benefit scheme are generally deductible with respect to taxable income. Depending on the home canton, the deductibility is limited to the contribution amount at the statutory retirement age. Following purchases, benefits may not be drawn in the form of capital in the three years following the purchases.
The full responsibility for the tax consequences of the continued post-retirement-age insurance, and of a possible capital withdrawal is borne by the insured person in every case. It is recommended to consult tax authorities in advance.

3 Announcement for the continued insurance after reaching the statutory retirement age

3.1 Is the insured person still employed in the company and does he/she require post-retirement-age insurance?

Yes No

If yes, what was the annual salary and degree of occupation **prior to the** statutory retirement age?

Salary in CHF _____, degree of occupation _____ %

If yes, what was the annual salary and degree of occupation **after** the statutory retirement age?

Salary in CHF _____, degree of occupation _____ %

3.2 *Is the insured person fully capable of working or earning?

Yes No

4 Confirmation

By signing this form the company and the insured person confirm that the details are complete and accurate and that the conditions under par. 2a have been met.

Place, Date:

Place, Date:

Stamp, Signature of the company:

Signature of the insured person:

Please return this form to: Your contracting office or Swisscanto Collective Foundation, Branch office, St. Alban-Anlage 26, P.O.Box 3855, 4002 Basle