

Questionnaire B: You are leaving Switzerland permanently to live abroad

Please provide your personal details in section 1. In section 2, tick box a) or b), depending on your situation, and then provide the information required. Sign the questionnaire in section 3) and return it to us, along with the supporting documentation required, at the following address: Caisse de prévoyance de l'État de Fribourg, Rue St-Pierre 1, 1701 Fribourg, Switzerland. **If you are moving to Liechtenstein: fill in questionnaire A or C.**

1. Personal details

Surname: Employee No.:

First name: Leaving date:

Address:

Tel.: Email address:

Marital status (tick as appropriate): ☐ Single ☐ Divorced ☐ Widow/widower

☐ Married since

☐ Separated, marriage date

☐ Registered partner (with someone of the same sex) since

Do you live with your spouse/registered partner? ☐ Yes ☐ No

Do you have dependent children (children up to age 18 or up to age 25 in education and living in the same household)? ☐ Yes ☐ No

Are you currently unable to work? ☐ Yes, since ☐ No

If yes, enter disability percentage

Due to ☐ Illness ☐ Accident

2. Details for payment of termination benefit

a. ☐ I am leaving Switzerland to live in a country in the EU/EFTA

➔ In this case, you can withdraw in cash only the part of your termination benefit that exceeds the LOB (Law on Occupational Benefits) retirement assets, called the "non-mandatory part". The legal minimum, called the "mandatory part", must be paid into a vested-benefits account or policy in Switzerland. On your insurance certificate, the non-mandatory part is the difference between the actual termination benefit and the mandatory part.

Details for cash payment of the non-mandatory part (alternatively, attach a printed copy of your bank details):

Full name of account holder:

Personal bank account number (IBAN):

Bank name and address

Bank SWIFT/BIC code (essential)

Payment of the mandatory part should be made to the vested-benefits foundation:

- ☐ of the Substitute Occupational Benefit Institution LOB in Zurich. For more information on the Substitute Occupational Benefit Institution LOB, go to the website www.aeis.ch.
- ☐ of the following institution:
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Please provide supporting documentation:

- Certificate of departure from the residents' register office or from the relevant immigration authority in Switzerland
- Certificate of residence abroad. If your country of residence does not issue a certificate of this kind, please contact us. For Swiss nationals, a certificate of nationality and registration issued by the embassy/consulate.
- Your application or confirmation of opening of a vested-benefits account, plus a pay-in slip. This document is not needed for a payment to the Substitute Occupational Benefit Institution LOB.

Recovering the mandatory part of the termination benefit: please see the LOB Guarantee Fund Foundation website for conditions (www.sfbvg.ch).

b. ☐ I am leaving Switzerland to live in a country outside the EU/EFTA

➔ In this case, you are entitled to payment of your entire termination benefit.

Details for cash payment of the termination benefit (alternatively, attach a printed copy of your bank details):

Full name of account holder:

Personal bank account number (IBAN):

Bank name and address

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Bank SWIFT/BIC code (essential)

Please provide supporting documentation:

- Certificate of departure from the residents' register office or from the relevant immigration authority in Switzerland
- Certificate of residence abroad. If your country of residence does not issue a certificate of this kind, please contact us. For Swiss nationals, a certificate of nationality and registration issued by the embassy/consulate.

Withholding of tax

Regardless of double taxation agreements, lump-sum benefits are always subject to the withholding of tax. In accordance with double taxation agreement rules, withheld tax deducted from lump-sum benefits will be refunded without interest when the beneficiary:

- a) Requests a refund within three years of the benefit due date; and
- b) Includes with his/her request a certificate from the relevant tax authority of the signatory state acknowledging payment of this benefit.

For more information on the withholding of tax, please contact the Fribourg Cantonal Tax Administration directly.

3. Signatures

Important: cash payment can be made only with the written consent of your spouse or registered partner. Their signature must be authenticated by the residents' register office for the municipality in which you reside, by a notary, or by them presenting themselves in person at our offices with an identity document. If your spouse/partner lives abroad, their signature must be authenticated by a notary or the Swiss embassy/consulate in that country. I confirm that the information I have provided is correct.

Place and date:

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Signature of insured person:

Mandatory signature of spouse or registered partner:

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Authentication of signature of spouse or registered partner (for use by the CPEF, municipality or notary only):

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