

Early retirement and partial retirement

*Contract no.: _____
 *Policy no.: _____
 *Company: _____
 Street, no.: _____
 Zipcode, city: _____

1 Personal details concerning the insured person

*Last name: _____ *First name: _____
 *Street, no.: _____ *Zipcode, city: _____
 *Date of birth: _____ *Civil status at retirement: _____
 *Is the person fully capable of working or earning? Yes No

If not, the form Notification of Incapacity to Work must also be submitted.

 Place, date Stamp, signature of the company or foundation

2 Information concerning the retirement

*Is an early retirement required? Yes No
 *Is a partial retirement required? Yes No

A partial retirement is only possible if designated in the regulations.

If yes, further employment to: _____% with an annual salary of CHF: _____

*Date of the early retirement respectively the partial retirement: _____

3 Explanations

- a) With a semi-retirement a maximum of three retirement steps are possible, whereby each step must equal at least 25 %. Semi-retirement must be accompanied by a corresponding reduction in the number of working hours and the basic salary. There must be a period of at least one year between two retirement steps. The pension fund regulations are authoritative resp. remain reserved in any case.
- b) If a change of the type of benefits is requested (i.e. partial or full capital option retirement benefit or full retirement pension) please use the form "capital option"

Please return this form to:
 Helvetia Swiss Life Insurance Company Ltd, P.O. Box 3855, 4002 Basle