GEMINI

GEMINI Collective Foundation
Bärengasse 25
P.O. Box
8001 Zurich

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Application for continued insurance after the reference age

(to max. age 70)

If the employment relationship continues beyond the reference age, insurance can continue for a maximum of five years.

Members must decide whether to continue the insurance **with** or **without** further savings contributions and any restructuring contributions. Risk contributions no longer apply, as the risks of disability and death are no longer insured (with the exception of the spouse's pension).

Insured person's details

Employee benefits unit		
Company		
Fund type ☐ Pension fund	☐ Management scheme/supplementary fund	
Insured person		
Surname		
First name		
OASI number	Insurance number	Gender
Date of birth	Marital status	
Address		
Postcode and city		

Please note the following pages

Continued insurance option

- ☐ Continuation **without** savings contributions (interest continues to accrue on the retirement benefit)
- ☐ Continuation **with** savings contributions, including any restructuring contributions

Actual retirement date

- ☐ The actual retirement date is ______________________
- ☐ The actual retirement date is not yet known.
  In this case, the maximum age (= reference age + 5 years) is set as the new retirement date.
  Retirement at the end of a given month may also be requested at any time prior to this.

Employment level

- ☐ The working hours remain unchanged.
- ☐ My working hours will be reduced. I am deferring the withdrawal of my pension benefits until retirement. The employer is required to report the reduction in salary and working hours on the portal.
- ☐ My working hours will be reduced. I request a withdrawal of my retirement benefits in line with the decrease in my working hours. This counts as partial retirement. The 'Notification of retirement' form must also be submitted.

Application for lump-sum withdrawal (must be submitted before member's death)

- ☐ I request payment of the full amount of my savings assets as a lump sum.
- ☐ I request a fixed monthly pension of CHF __________ and the remainder as a lump sum.
- ☐ I request _____ % or CHF ___________ as a lump sum and the remainder as a pension.
- ☐ I request the full benefit in the form of a pension.

Capacity for work

☐ Yes ☐ No Is the member fully fit for work at the time of the continuation?

Please note

- Members must notify the Foundation in writing no later than one month before the statutory retirement age which of the above options they choose. Once made, the choice of option can no longer be changed until actual retirement.
- In the absence of any notification within the specified time, regular retirement (at the reference age) will apply.
- In the event of the continuation option with savings contributions, the previous split between employer and employee contributions applies according to the most recent pension plan.
- Any life partnership must have been established prior to retirement and also prior to the retirement age specified in the regulations.
- Upon withdrawal of the lump-sum payment, any entitlements to spouse's/partner's or life partner's pensions, as well as retired person's children's benefits, will lapse.
- Any benefits resulting from buy-ins may not be withdrawn as a lump sum within the following three years. Members are responsible for clarifying any tax-related issues.
- Actual retirement must be applied for one month prior to retirement using the 'Notification of retirement' form
- together with the relevant attachments.
- Information requirement: The 'Notification of retirement' form only contains specific information regarding continued insurance after the age of 65 and does not relieve members of the obligation to consult the 'Fact sheet - retirement' and the Foundation's Framework Regulations on this subject.

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Signatures

I hereby declare that I have read the above information and have completed the form truthfully and accurately.

____________________________ ____

Place/date Member’s signature

____________________________ ____

Place/date Signature of the spouse/registered partner

Notarisation / *Confirmed marital status:

In the case of lump-sum withdrawals of **CHF 10,000 or more**, **married** members or those **in a registered partnership** must provide certified confirmation of their spouse’s or partner’s consent.

The certification must be provided on this form and can be obtained from your local authority, another municipality or the human resources department.

All other members must provide a current certificate of marital status (issued no more than six months).

Notarisation / Confirmation was provided by

☐ from the commune

☐ a notary

☐ from HR / **First and last name in block letters** ______________________________________

Papers presented: ☐ ID ☐ Passport number: ______________________________________

____________________________ ____

Place/date Signature and stamp of the witness/notary

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