

Request to open a UBS vested benefits account and transfer termination benefits

What do I need to do to open a UBS vested benefits account?

All you have to do is carry out step 1 below and everything else will be done for you.

1. Give your pension fund or current vested benefits foundation instructions to transfer your termination benefits to the Vested Benefits Foundation of UBS. Please find enclosed a letter template that you can use to do this.
2. Your pension fund or existing vested benefits foundation will send you a withdrawal statement and transfer your termination benefits directly to the Vested Benefits Foundation of UBS.
3. The Vested Benefits Foundation of UBS will open an account for you and credit your termination benefits to it.

You will receive a letter informing you that your account has been opened together with your account number and a confirmation of receipt of deposit.

The benefits of the UBS vested benefits account at a glance:

- A means of securing your retirement assets for the future
- Attractive returns thanks to a preferential interest rate
- No account or custody account fees
- Free annual asset statement
- You can use your retirement assets to finance owner-occupied residential property
- You have the opportunity to invest in UBS Vitainvest investment funds
- No obligation to sell UBS Vitainvest investment funds, e.g. upon reaching the age limit. Instead they can be transferred free of charge to your personal UBS custody account
- Immediate cash payment of retirement capital in the events specified by the Federal Vesting Law
- When the capital is paid out it is taxed separately at a reduced rate

If you have any questions

For more information, please visit our website at www.ubs.com/vestedbenefits-private or call our Infoline on +41-61-226 75 75.

Transfer request for vested benefits

Dear Sir/Madam

Please send the withdrawal statement for my retirement benefits and transfer my retirement assets to the Vested Benefits Foundation of UBS AG.

Bank account:

UBS Switzerland AG, CH-8098 Zurich
in favor of: CH81 0023 0230 1011 8870 0
Vested Benefits Foundation of UBS AG
CH-4002 Basel

Or postal account:

UBS Switzerland AG, CH-8098 Zurich,
account no. 80-2-2
in favor of: CH81 0023 0230 1011 8870 0
Vested Benefits Foundation of UBS AG
CH-4002 Basel

Further personal details for identification purposes:

Date of birth

AHV or social security number

Last employer