

Quick and easy

Open a vested benefits account **online**

When a member leaves your pension fund, UBS FZweb lets you open an account and transfer their vested benefits to it in just a few steps. All online.

With UBS FZweb, you can send these notifications with a few quick, simple and secure steps via the Internet, while at the same time offering your plan members an attractive solution for their vested benefits.

Opening accounts via the Internet with UBS FZweb

UBS FZweb lets you enter the data required to open an account in a user-friendly form on the Internet. Since the data is forwarded electronically to the UBS Vested Benefits Foundation, this makes the opening process much faster than sending documents by post. Opening and closing a vested benefits account are free of charge both for you and for the pension account holder.

The information entered into the forms is forwarded to the UBS Vested Benefits Foundation in an encrypted format. If you put your e-mail address on the form, you will receive a confirmation e-mail with a reference number following receipt of the data. The UBS Vested Benefits Foundation then checks and processes the registered information and notifies the plan member in writing that a UBS vested benefits account has been opened. Once payment has been received, we send you and the plan member confirmation of receipt of the funds.

Visit ubs.com/vestedbenefits to find the online form for account opening.

Your benefits

- Simple data entry using the online form
- No obligations whatsoever
- Free account opening
- Confirmation of receipt by e-mail for all received data
- Confirmation of receipt of funds for each transfer
- Secure data transfer via encrypted transmission

Advantages for your plan members

- Interesting and comprehensive publications on retirement savings
- Expert advice from UBS
- Free opening, maintenance and closing of the UBS vested benefits account
- Attractive interest rates on the UBS vested benefits account
- Possibility of investing in securities with UBS Vitainvest funds
- No obligation to sell UBS Vitainvest funds when official retirement age is reached
- Residential property can be financed from retirement savings
- No wealth tax, income tax or withholding tax until retirement savings are paid out

Contact

We will be pleased to provide more information about UBS FZweb in a personal consultation, and show you how plan terminations can be processed more efficiently.

Vested Benefits Foundation of UBS AG
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ubs.com/vestedbenefits