



Notification Continuation of early retirement models

Contract no. /

Employer Name and location

Insured person

Last name

First name

Insurance number

Street

Date of birth

Gender

Postal code and place

Country

m f

Can be reached at

Private email address

Phone no.

**Start of bridging
pension**

Date

Is the insured person fully fit for work?

Yes

No

Please submit the "Notification of incapacity for work" form with the corresponding enclosures.

Enclosure

Pension confirmation – bridging pension (**must be attached**)

**Person submitting
notification on behalf
of the employer**

Date

Surname

First name

E-mail address

**Signature of
insured person**

Date

Signature of insured person

Please send to formsservice.bvg@axa.ch

or to:

AXA

Postfach 300

8401 Winterthur



Summary sheet

Flexible retirement for sector-specific early retirement models

You are insured via your employer for mandatory occupational pension provision with an AXA collective foundation. AXA collective foundations offer continued pension provision for bridging pensioners covered by the Flexible Retirement Foundation (FAR) and other sector-specific early retirement models.

If you merely reduce the hours you work and draw a reduced bridging pension, you will continue to be insured with your employer's occupational benefits scheme based on your BVG (2nd pillar) salary.

If you draw a full bridging pension, you have 3 options with the AXA collective foundations:

- Early withdrawal of your retirement benefits → Submit “Notification of withdrawal” form via your employer. (Early withdrawal results in a reduction in retirement benefits.)
- Transfer of your vested benefits to a vested benefits account → Submit “Notification of withdrawal” form via your employer.
- Continuation of your pension coverage on request within 3 months of the end of the employment relationship → Submit “Continuation of early retirement models” form via your employer.

What benefits are insured during continued pension coverage?

1

Your retirement assets and death benefits are insured until ordinary retirement age at the latest. Survivors' benefits are also provided in the event of an accident. As you already draw a bridging pension, disability benefits are not insured. Pension provision will be continued on the basis of the annual salary paid immediately before termination of the employment relationship.

What happens to the retirement credits?

2

The occupational benefits institution operating the early retirement model transfers the retirement credits to the AXA collective foundations, which credit them to your retirement assets in the form of deposits. This increases your retirement benefits.

Your entitlement to retirement credits can only be claimed from the occupational benefits institution providing your bridging benefits. Rights and obligations in relation to the occupational benefits institution operating the early retirement model are governed by its regulations.

Are any fees charged for continued pension coverage?

3

You may be required to make risk and cost contributions as well as contributions to the Guarantee Fund for continued occupational pension coverage. Please check this with the occupational benefits institution which provides your bridging pension.

Who can apply for continued pension coverage?

4

You must be entitled to early retirement benefits in accordance with the provisions of your occupational benefits institution and be fully fit for work. Continuation is possible until your ordinary retirement age.

Where can I get an overview of my AXA pension benefits?

5

Like up to now, you will receive your pension fund certificate showing your current benefits.

Further information about current interest and conversion rates can be found at www.axa.ch/pensionskasse.

Please do not hesitate to contact your AXA pension advisor if you have any questions.

Where can I get information about the benefits of my bridging pension?

6

Please contact the occupational benefits institution operating your early retirement model.