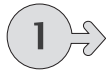


Directions



Fill in forms



Sign forms



Copy passport
or ID



Send



Confirmation

Attractive 3a retirement savings solutions from Liberty Foundation for 3a Retirement Savings ("Foundation") in a few easy steps:

1

To ensure that the account can be opened and your funds transferred and invested smoothly and punctually, please fill in the following forms and forward them to us by post:

- **Application to open an account** and affiliation sheet. Please note that no more than five 3a retirement savings accounts may be opened. A separate account opening application must be submitted for each 3a retirement savings account/deposit.
 - **Transfer order**, for the transfer to Liberty Foundation for 3a Retirements Savings from a 3a retirement savings account.
 - **Standing order**, if the annual contributions are to be paid by bank order.
 - **Application form for Liberty Connect**, if desired.
-

2

For the account opening and transfer to be valid, all the above-listed forms must be received duly signed. Please list the attached documents sent on the final sheet.

3

Always attach a copy of your passport or ID (showing the photo and a legible signature).

4

Please send the complete documentation to:

info@liberty.ch or

Liberty Pension
Steinbislin 19
PO Box 733
6431 Schwyz

5

The Foundation will send the Client an account opening confirmation within a few days. The transfer order, duly signed and completed by the Client, will be forwarded to the Client's previous 3a retirement savings institution, bank or insurance company with the corresponding payment slip and confirmation.

As soon as the funds are received, the Foundation will send the Client a credit advice. If a securities solution was agreed, the pension assets will be invested in accordance with the Client's instructions.

The Foundation has no influence on the time it takes to transfer the funds. Any inquiries should be addressed directly to 3a retirement savings institution, bank, insurance company or consultant.

We remain at your disposal for any further assistance and information.

Liberty Vorsorge
+41 58 733 03 22
info@liberty.ch

Application to Open an Account with Liberty Foundation for 3a Retirement Savings

Client particulars	Title * <input type="checkbox"/> Mr <input type="checkbox"/> Mrs/Ms	Title <input type="checkbox"/> Dr. <input type="checkbox"/> Prof. <input type="checkbox"/> Prof. Dr.
	Name *	First name *
	Street, N° *	Postal code, place, country *
	Nationality	Phone
		Date of birth *
	Insurance number (AVS) *	Civil status/date of marriage *
		Email address *
Pension connection	<input type="checkbox"/> I am a member of a pension fund (2 nd pillar) <input type="checkbox"/> I am <u>not</u> member of a pension fund (2 nd pillar)	
	<input type="checkbox"/> Self-employed <input type="checkbox"/> Unemployed <u>without</u> unemployment benefits <input type="checkbox"/> Part time	<input type="checkbox"/> Employed <input type="checkbox"/> Unemployed with unemployment benefits <input type="checkbox"/> With earned income abroad
Transfer Instructions	<input type="checkbox"/> With regard to the account opening application form and in accordance with the attached transfer order, I hereby instruct the Foundation to collect my pension assets and any securities held with my prior 3 rd pillar pension institutions. In absence of a transfer order, a payment slip will be enclosed with the account opening confirmation.	
Standing order	<input type="checkbox"/> I authorise the Foundation to submit the attached standing order to my bank.	
Liberty Connect	<input type="checkbox"/> I would like online access to my pension relationship(s) and enclose my application for Liberty Connect.	
Intermediary/Consultant	<input type="checkbox"/> I am already registered with Liberty as a intermediary/consultant. <input type="checkbox"/> I would like to register with Liberty as a intermediary/consultant.	
	Company name	Phone
	Name	First name
	Street, N°	Postal code, place, country
Consulting fees for account solution	The intermediation fee of _____ % or CHF _____ (max. 3%) is charged once on each deposited amount. The intermediation fee covers the intermediary/consultant's costs of business initiation and guidance to the account-holder. For account solutions, the subscription fee is limited to a period of 12 months.	
	Fees shall be charged by the Foundation to the member's account in accordance with the Fee Schedule.	
Correspondence instructions	<input type="checkbox"/> Hold, do not send <input type="checkbox"/> send by email * <input type="checkbox"/> Client <input type="checkbox"/> Intermediary/Consultant <input type="checkbox"/> Client with copy to Intermediary/Consultant <input type="checkbox"/> send by post * <input type="checkbox"/> Client <input type="checkbox"/> Intermediary/Consultant <input type="checkbox"/> Client with copy to Intermediary/Consultant	
	* Choose between email and post.	
	<input type="checkbox"/> Client's address for correspondence (if different):	
	c/o Name/Company	First name/Contact
	Street, N°	Postal code, place, country
Paying agent	<input type="checkbox"/> Valiant Bank AG <input type="checkbox"/> Credit Suisse AG	

Client visa

Affiliation sheet

Client

Client/Portfolionumber

Name

First name

Confirmation

I hereby confirm that all the information provided by me is true and accurate and request the opening of the desired account/deposit. I further confirm that I have read and understood the Regulations and General Terms and Conditions of the Foundation and that I accept their contents. **The currently valid Foundation Regulations and General Terms and Conditions are published on the liberty.ch homepage under the heading «Foundation Regulations/General Terms and Conditions».**

**Data exchange/
Authority to provide information**

I hereby release the Foundation and its representatives from all confidentiality obligations under Swiss law or any other applicable law which may prohibit the disclosure of such information (e.g. Article 62 FADP) and agree that the Foundation may share certain personal data of mine in accordance with the Privacy Policy. In particular, the data will be disclosed to provide the Foundation's products and services requested by me, but also for marketing purposes. I hereby authorise the Foundation and agree that it may also disclose my personal data to foreign recipients (e-mail communication, data centers) as part of the above-mentioned data disclosures. **The currently valid Privacy Policy is published on the liberty.ch homepage under the heading «Privacy Policy».**

Signature

Place, date

Client signature

Attachments

- Copy of passport or ID (with photo and legible signature) *
- Transfer order
- Standing order
- Application form for Liberty Connect

* **mandatory documents**

**Intermediary/
Consultant**

(to be filled in only by the intermediary/consultant)

The intermediary/consultant hereby confirms that the information provided by the client is complete and accurate.

Name, first name

Agency

Place, date

Intermediary/Consultant signature

Transfer order/authorisation for existing 3rd pillar pension plan

Sender
(Principal/
Client)

Name First name
Street, N° Postal code, place

3rd pillar
pension plan

Name and address of existing 3a retirement savings institution, bank, insurance company Account number

Transfer order

I hereby instruct the above-mentioned 3a retirement savings institution, bank or insurance company to transfer funds to my 3a retirement savings account with Liberty Foundation for 3a Retirement Savings in accordance with the attached payment slip.

Please handle any securities as follows (please attach current securities deposit statement):

- sell and transfer proceeds of sale in accordance with the payment slip
- transfer the securities in accordance with the attached delivery instructions and pay the balance in accordance with the payment slip

As reference, please indicate the Client's name and first name and his insurance number.

3rd pillar
pension plan

Name and address of existing 3a retirement savings institution, bank, insurance company Account number

Transfer order

I hereby instruct the above-mentioned 3a retirement savings institution, bank or insurance company to transfer funds to my 3a retirement savings account with Liberty Foundation for 3a Retirement Savings in accordance with the attached payment slip.

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- sell and transfer proceeds of sale in accordance with the payment slip
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3rd pillar
pension plan

Name and address of existing 3a retirement savings institution, bank, insurance company Account number

Transfer order

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Please handle any securities as follows (please attach current securities deposit statement):

- sell and transfer proceeds of sale in accordance with the payment slip
- transfer the securities in accordance with the attached delivery instructions and pay the balance in accordance with the payment slip

As reference, please indicate the Client's name and first name and his insurance number.

Signature

Place, date Client signature

Attachments

- Foundation payment slip
- Delivery instructions (for the transfer of securities to the Foundation)
- Current statement of Client's security deposit (for securities transfers)

Confirmation
from the new
Foundation

We hereby confirm that the Client's account with Liberty Foundation for 3a Retirement Savings is a vested benefits account in accordance with Article 82 BVG/LPP and Article 1 BVV3 of the Vesting Law.

Liberty Foundation for 3a Retirement Savings, Schwyz

Signature

Signature of Foundation

Standing Order (3rd Pillar)

Client particulars

Title Mr Mrs/Ms Date of birth

Name First name

Street, N° Postal code, place

I would like to use the free service and instruct my bank to set up the standing order as follows:

Bank Address

Contact person

Set up the standing order by means of the enclosed payment slip to the debit of

my account N° _____

in favour of my retirement savings account (Client/Portfolionumber) _____ with
Liberty Foundation for 3a Retirement Savings (to be completed by the Foundation)

Amount I would like to transfer the following amount: CHF _____

Note Please note the applicable statutory maximum amount per year.
If you are already paying an amount for pension plan 3a, only the difference up to the statutory maximum amount may be transferred to the pension plan account.

Periodicity monthly quarterly six-monthly yearly

Execution date on each _____

first payment _____

last payment _____ until further notice

Debit notice Please send me a debit notice.

Note Standing orders for the current year must be submitted to Liberty Foundation for 3a Retirement Savings by the end of November of the current year.

Signature Place, date Client signature

Application for Liberty Connect

Client	Client number	Insurance number (AVS)
	Name *	First name *
	Street, No *	Postal code, place, country *
	Date of birth *	Mobile number *
	Email address *	
	* mandatory fields	

Means of authorisation

The user name and password for Liberty Connect will be sent by post.

Account and deposit authorisation

I agree that all my existing and future accounts/deposits relating to my individual pension relationships with one or if applicable, several pension institution/s, as the case may be (hereinafter «Foundation/s»), which provide Liberty Connect, are automatically activated in Liberty Connect. This consent shall also automatically apply to any future pension relationships with foundations that are not yet active or existing. **Note:** The contractual partner of Liberty Connect is in each case the Foundation with which a corresponding pension relationship has been established for the activated account/deposit account.

Declaration

I hereby declare that the provided information is true and accurate, and I request access to Liberty Connect. I confirm that upon receipt of the provided access information, I will view and accept my cash and securities balances including all transactions online. In addition, I agree that with immediate effect all documents and messages (including year-end statements and tax certificates) will be sent to me solely via Liberty Connect. Furthermore, I confirm that I have read the Terms and Conditions for Liberty Connect and accept them in their entirety as an integral part of the contractual agreement. **The currently valid Terms and Conditions for Liberty Connect are published on the liberty.ch homepage under the heading «Foundation Regulations/General Terms and Conditions».**

Signature

Place, date

Client signature

This application should be returned to us by email or in hard-copy to the address below.