



1. Checklist for opening your vested benefits policy

The following checklist informs you on the necessary documents for successfully opening the policy as well as on the successive steps leading to the issuance of your vested benefits policy.

1.1. PROCEDURE

- 1 Complete the application form in full.
- 2 Print the application form as well as the prepaid stamp.
- 3 Cut out the prepaid stamp and stick it on an envelope.
- 4 Date and sign pages 2 and 3 of the application form and send all 4 pages to us by post, including copy of your identity document.

Please note: the required minimum amount of your investment is CHF 20'000.– and must not exceed CHF 500'000.–.

1.2. NECESSARY DOCUMENTS

- Copy of a valid identity document of the policyholder: Swiss passport or identity card (both sides of the card please) or official foreign identity document
- Duly completed, dated and signed „Application for the vested benefits policy" (pages 1 and 2 of the document)
- Duly completed, dated and signed „Instruction to the previous occupational benefits institution" (pages 3 and 4 of the document)

1.3. INFORMATION ON THE INTERNAL HANDLING OF YOUR APPLICATION AT GENERALI

- 1 Reception at Generali of the application form (all 4 pages), including copy of your identity document (prepaid return envelope)
- 2 Examination of completeness of all documents by the competent business unit at Generali
- 3 Transmission of the form „Instruction to the previous occupational benefits institution" (pages 3 and 4 of the document) by the competent business unit at Generali
- 4 Upon receipt of your vested benefits amount from your previous occupational benefits institution, Generali issues your new vested benefits policy and sends it to you by post.

If you have questions or need advice, do not hesitate to contact us during office hours on our freephone number 0800 881 882.

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