



## Request for calculation of a future pension for men

The calculation is based on your personal situation (marital status, income etc.) and in accordance with the legal provisions in force. Any changes in your situation or to the law applicable (retirement age, eligibility criteria, calculation rules, contribution requirement etc) may have a bearing on your pension entitlement and amount.

An accurate calculation of the OASI (or DI) benefits to which you will actually be entitled to can therefore only be made when the insured event (old-age, death or disability) occurs.

The desired calculation (**one choice only**) concerns a future:

- Old-age pension
- Disability pension
- Survivor's pension (in the event of the applicant's death)

### 1 Identity

#### Last name

Including the single name

#### All first names

The usual first name in capitals

#### Date of birth

#### OASI number

#### Sex

Male

Female

#### Marital status

single

married  
since

widowed  
since

divorced  
since

separated  
since

Mark with a cross  
what is appropriate  
or state the exact  
date of each  
marriage

1<sup>st</sup> marriage

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2<sup>nd</sup> marriage

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3<sup>rd</sup> marriage

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Last name, first names and date of birth of former spouses

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Your home address

Street and number

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Post code / Town / Country

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E-mail

Telephone / Mobile

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## Nationality/ies

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Swiss citizenship since

Place of origin / Canton

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## 2 Spouse's personal information

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### Last name

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Including the single name

### All first names

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The usual first name in capitals

Date of birth

Sex

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### Does the spouse have an OASI number?

yes

no

If yes, OASI number

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## 3 Children

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### Entitlement to educational credits

Insured persons may claim educational credits for the years during which they had parental authority over one or more child/ren under the age of 16.

A copy of any documents relating to parental authority must be attached to the application.

### Do you have any children of your own, of your spouse/partner, out of wedlock, adopted or fostered?

(adopted children have the same rights as one's own children)

yes

no

Please list on the next page, the names of all these children even those who are older than 16, adults or deceased.

**Last name of 1st child**

**First name**

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**Date of birth**

**Date of death, if applicable**

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**Status**    own child                       spouse's/partner's child                       foster child

**Identity of the other parent**

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last name, first name, date of birth

**Who has parental authority?**    joint    the mother    the father  
(following a divorce or if you are not married to the other parent)

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**Last name of the 2nd child**

**First name**

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**Date of birth**

**Date of death, if applicable**

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**Status**    own child                       spouse's/partner's child                       foster child

**Identity of the other parent**

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last name, first name, date of birth

**Who has parental authority?**    joint    the mother    the father  
(following a divorce or if you are not married to the other parent)

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**Last name of the 3rd child**

**First name**

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**Date of birth**

**Date of death, if applicable**

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**Status**    own child                       spouse's/partner's child                       foster child

**Identity of the other parent**

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last name, first name, date of birth

**Who has parental authority?**    joint    the mother    the father  
(following a divorce or if you are not married to the other parent)

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If you have more than 3 children, please list them and their data on a separate sheet.

#### 4 Place of residence and professional activity

In order to determine your Swiss contribution periods as precisely as possible, please state the exact duration of your professional activity and residence in Switzerland.

Exact date of entry into Switzerland and location

##### Residence in Switzerland (foreign nationals should state the type of permit)

Location	from	until	Type of permit
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

##### Professional activity in Switzerland

Employer's name and location	from	until
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Do you work as a cross-border commuter?  yes  no

##### Spouse's/Ex-spouses' residence and professional activity in Switzerland

Did your spouse/ex-spouse/s reside in Switzerland?  
For foreign nationals, please state the type of permit

Location	from	until	Type of permit	Spouse's or ex-spouse's name

Did your spouse/ex-spouse/s work in Switzerland?

Employer's name and location	from	until	Spouse's/Ex-spouse's name

### 5 Income from professional activity

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For persons who are still contributing to the Swiss OASI (compulsory or voluntary insurance):

Do you intend to change your occupation rate in the future?  no  if yes:

a) from what date? \_\_\_\_\_ (month/year)

b) to what extent? \_\_\_\_\_ (in %)

c) without professional activity from \_\_\_\_\_ (month/year)

### 6 Flexible retirement

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In the event of partial early retirement and partial deferment, only one change in the percentage is possible between the ages of 63 and 70.

#### Early retirement

If you opt for early retirement, your benefits will be reduced for the full duration of your retirement. For men, regardless of their year of birth, as well as for women born after 31.12.1969, the reference age (corresponding to the "retirement age") is 65. Entitlement to payment of the benefits starts the following month.

#### Do you wish to start receiving your pension early?

**No**, please provide me with the estimated amount of 100% of the pension at the reference age.

**Yes**, I choose below a standard or a detailed calculation (**only one choice possible**)

**standard calculation**, i.e. 3 amounts: 24 months early / 12 months early / at the reference age. If the spouse is entitled to a benefit, the possible changes in the pension amounts will also be indicated.

**detailed calculation\*** : you can specify periods or percentages of early retirement. For example, you decide to take 50% of your pension at age 63 and then, at age 64, you increase the early pension share by 20%. The remaining 30% will be paid at the reference age.

Please state the date from which you wish to receive your early pension (at age 63 at the earliest):

Early retirement date from: \_\_\_\_\_ (dd.mm.yyyy)

Please state the percentage of early retirement:

- entire pension: 100%
- partial pension \_\_\_\_\_ % (between 20% and 80%)
- potential increase of the early retirement share \_\_\_\_\_ % from \_\_\_\_\_  
(between 10% and 80%)

N.B. Unless otherwise stated, the remaining early retirement share will be paid at the reference age.

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### Deferred retirement

You may defer the payment of your pension and will then receive an increased monthly pension.

#### Do you wish to defer your pension?

**No**, please provide me with the estimated amount of 100% of the pension at the reference age.

**Yes**, I choose below a standard or a detailed calculation (**only one choice possible**)

**standard calculation** including communication of the estimated 100% pension amount at age 65, together with a table of applicable rates of increase for a revocation between 12 and 60 months.

**detailed calculation\***: please state below the duration and percentage/s of deferment:

- deferment of the entire or part of the pension \_\_\_\_\_ % (between 20% and 100%)  
for a duration of \_\_\_\_\_ months (between 12 and 60 months)
- reduction of the deferment share \_\_\_\_\_ % (between 10% and 80%)  
from \_\_\_\_\_ (mm.yyyy)

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**\*Detailed calculation**: as a rule, only one detailed calculation is free of charge. For any further requests, a fee of up to CHF 300 may be charged.

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Date

Signature

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