

To PostFinance Retirement Savings Foundation 3a

## Personal details

Retirement savings account no. \_\_\_\_\_

Last name \_\_\_\_\_

First name \_\_\_\_\_

Date of birth \_\_\_\_\_

Telephone \_\_\_\_\_

## Choice of retirement fund (only one selection possible per order)

- ☐ PF Pension - ESG 25 Fund (ISIN no. CH0012056260) ☐ PF Pension - ESG 50 Fund (ISIN no. CH0012056203)
- ☐ PF Pension - ESG 75 Fund (ISIN no. CH0316793139) ☐ PF Pension - ESG 100 Fund (ISIN no. CH0484781684)

## Single order

- ☐ Purchase, amount<sup>1</sup> CHF \_\_\_\_\_ ☐ Purchase (buy) total current retirement savings account credit
- ☐ Redemption (sale), amount<sup>2</sup> CHF \_\_\_\_\_ ☐ Redemption of all stock<sup>2</sup>

<sup>1</sup> Purchase will be at the next possible execution date.

<sup>2</sup> The proceeds will be credited to the retirement savings account 3a.

## Funds saving plan

- ☐ Open a funds saving plan:  
use retirement savings account credit to regularly invest in the selected retirement fund
- Amount \_\_\_\_\_ first execution date<sup>3</sup> \_\_\_\_\_
- last execution date \_\_\_\_\_ ☐ until revoked
- Frequency of fund subscription ☐ twice a month<sup>4</sup> ☐ monthly ☐ every two months ☐ quarterly
- ☐ Cancel (stop funds saving plan)<sup>5</sup>

<sup>3</sup> If the execution date falls on a Saturday, Sunday or general public holiday, the purchase will be made on the next possible execution date.

<sup>4</sup> The first execution date must be between the 1st and 15th day of the month.

<sup>5</sup> Does not include the sale of fund units. Only regular purchasing orders will be stopped.

## Standing order for fund investment

- ☐ Record standing order:  
Invest all future inpayments to retirement savings account 3a in the selected fund. Inpayments include all credits on the retirement savings account 3a, including interest credits.
- ☐ Cancel existing standing order<sup>6</sup>

<sup>6</sup> Does not include the sale of fund units. Only regular purchasing orders will be stopped.

## Consultation and risk information

A retirement fund can only be purchased if a PostFinance customer advisor has advised me personally, or if I have explicitly declined a consultation (waiver of advice, execution only)

☐ **I attended a consultation**

I attended a personal consultation in a PostFinance branch, and received a written investment proposal from PostFinance. My situation has not changed since the consultation.

By signing this form, I confirm that I have been informed by a PostFinance customer advisor about the general risks of fund investments as well as the risks, the type of investment and the costs of the investments carried out. The PostFinance customer advisor has also made these documents available to me, which I have acknowledged and accept as binding:

1. The brochure "Risks Involved in Trading Financial Instruments", 2. The product description "Retirement fund with the retirement savings account 3a", 3. The key information document (KID) and 4. The fund costs and sales remuneration factsheet – all of which I have received for each fund I purchased. If you purchase a fund that we do not recommend, PostFinance will advise you against doing so. The order can only be issued if PostFinance has in fact carried out a consultation. The documents are available at [postfinance.ch/retirementplanning-information](https://postfinance.ch/retirementplanning-information).

☐ **I wish to issue the order without a consultation (waiver)**

PostFinance does not conduct an appropriateness test or a suitability test. The order is submitted without a consultation.

By signing this form, I confirm that I am familiar with the investment fund business. I understand the functioning and risks of funds associated with retirement funds in particular. I acknowledge these documents and accept them as binding:

1. The brochure "Risks Involved in Trading Financial Instruments", 2. The product description "Retirement fund with the retirement savings account 3a", 3. The key information document (KID) and 4. The fund costs and sales remuneration factsheet – all of which I have received for each fund I purchased. These documents are available at [postfinance.ch/retirementplanning-information](https://postfinance.ch/retirementplanning-information).

The PF Pension - ESG 25 Fund, PF Pension - ESG 50 Fund, PF Pension - ESG 75 Fund, and PF Pension - ESG 100 Fund investment funds are issued in accordance with Swiss law. The PF Pension - ESG 25 Fund meets the requirements of BVV2. Based on article 50, paragraph 4 of BVV2, the equity component of the PF Pension - ESG 50 Fund, the PF Pension - ESG 75 Fund and the PF Pension - 100 Fund is higher than that of traditional retirement funds. The PF Pension - ESG 50 Fund, PF Pension - ESG 75 Fund and PF Pension - ESG 100 Fund investment funds are therefore only suitable for investors with the relevant risk capacity and risk appetite. Orders must be sent to the PostFinance Retirement Savings Foundation 3a in writing by post. If the information on this form is incomplete or unclear, the execution of the fund order on the next possible date cannot be guaranteed. The foundation accepts no liability for any resulting price differences.

I acknowledge and accept that receives PostFinance remuneration from third parties when selling investment funds. I expressly waive my right to delivery of such remuneration and agree that PostFinance may retain this as remuneration for the sales services carried out. The remuneration may change at any time. The information is available in the document "Fund costs and sales remuneration" at [postfinance.ch/retirementplanning-information](https://postfinance.ch/retirementplanning-information).

Information on the implementation of the Financial Services Act (including PostFinance's licence and the contact details of the supervisory authority and the ombudsman conciliation office) is available at [postfinance.ch/finsa](https://postfinance.ch/finsa).

Location \_\_\_\_\_

Date \_\_\_\_\_

Signature \_\_\_\_\_

**Please send the form to:**

PostFinance Retirement Savings Foundation 3a  
P.O. Box  
CH-4002 Basel