PKDW
Pensionskasse für die Deutsche Wirtschaft

Pensionskasse
für die Deutsche Wirtschaft
Postfach 10 10 54
47010 Duisburg

Applicant:

Membership number

Surname, first name

Street, number

Postcode, town/city

Phone number in case of further questions (not mandatory)

Email address in case of further questions (not mandatory)

Application for Lump Sum Payment on:

Enter date

– to be submitted three years in advance

Pursuant to Section 24 (8) of PKDW's General Terms and Conditions of Insurance (GTCI), I hereby apply irrevocably for payment of a one-off lump sum at the time specified above. I confirm that I have not applied nor will I apply for premiums subsidised under the Riester scheme (Sections 10a and 82 et seq of the German Income Tax Act [EStG]) in relation to the above policy.

The personal data relating to the insurance contract will be processed in accordance with the requirements of the EU General Data Protection Regulation (GDPR) and the new version of the Federal Data Protection Act (BDSG-neu) within the meaning of Article 4 (2) GDPR.

Place, date

Member's signature

I am married or live in a civil partnership, in accordance with the German Civil Partnership Act (LPartG)

☐ Yes (please fill in next section) ☐ No

It is requested that, after the death of the primary insurance holder, the dependants are provided for as follows:

☐ through a one-off lump sum

☐ through provision of a dependants' pension

For annuities of less than 600 euros, the dependants' pension is generally paid together with the one-off lump sum of the retirement pension.

Place, date

Spouse's signature

For company members, the employer's consent is required:

By submitting the above application, we confirm that we agree to Section 24 (8) of Pensionskasse für die Deutsche Wirtschaft's General Terms and Conditions of Insurance (GTCI).

Place, date

Signature, company stamp

Please note that, in accordance with the German Retirement Income Act of 11/06/2004, once the one-off lump sum has been made, the conditions for tax-exempt contributions in accordance with Section 3 (63) EStG ceased to apply from 01/01/2005 - here: Date of application.

Information sheet

On the basis of the Act on the Modernisation of Statutory Health Insurance Schemes (GMG) of 19/11/2003, the full contribution rate for pensions from the health insurances schemes also applies for calculating contributions from pensions for pensioners with statutory health insurance from 01/01/2004. PKDW will deduct this contribution directly from current pension payments.

The revised version of Section 229 (1) (3) of the Social Security Statute Book V (SGB V) of 01/01/2004 enforces payment of contributions for all lump sum payments that form part of retirement, dependants' and reduced capacity pension schemes.

For one-off lump sums, 1/120 of the sum will be added to the pensioner's income that is liable to contributions for ten years.

Please submit the following documents approximately eight weeks before the payment date:

> the insurance certificate,
> a copy of your birth or marriage certificate,
> your tax identification number,
> your social security number,
> the address of your health insurance scheme and your insurance number,
> your bank details and
> if the lump sum is being paid before the age of 65, proof of loss of income as well

Note: According to the legal definition of a pension fund, PKDW may only insure against loss of income.
As confirmation of loss of income, please provide a copy of the first page of your pension notice or unemployment notice plus written confirmation that the combined unemployment benefit and pension fund benefit does not exceed the income you previously earned.
The same applies to the inactive phase of early retirement

You are, of course, allowed to ensure that any data that is not relevant for the pension fund in carrying out the contract cannot be used to identify you personally.

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