

Request to change provider

PEPP SAVER (HEREINAFTER ALSO THE “CLIENT”)

FIRST NAME

SURNAME

DATE OF BIRTH

PHONE

E-MAIL

ACCOUNT NUMBER IN FINAX

PERMANENT RESIDENCE ADDRESS
STREET

NUMBER

POSTCODE

CITY

COUNTRY

RECEIVING PROVIDER (HEREINAFTER THE “FINAX”)

FINAX, O.C.P., A.S.
BAJKALSKÁ 19B
821 01 BRATISLAVA
SLOVAKIA
Company ID No.: 51 306 727

+421 232 447 760
CLIENT@FINAX.EU
WWW.FINAX.EU

TRANSFERRING PROVIDER (HEREINAFTER THE “TRANSFERRING PROVIDER”)

NAME

ADDRESS

IBAN

Company ID No.

WEB

Date from which payments are to be made to the PEPP account opened with Finax as the receiving PEPP provider and on which the account held with the transferring provider will be cancelled (hereinafter the “PEPP provider change date”):*

*To let us carry out and arrange the transfer properly, please state a date at least 30 days in advance.

If a transfer of non-cash assets is possible and the Client requests the transfer of non-cash assets:

The Client requests the transfer of non-cash assets ☐ YES ☐ NO

The Client agrees that the Transferring provider shall:

- send the Client and Finax a PEPP benefit statement for the period from the date of preparation of the last PEPP benefit statement until the date of submission of the request,
- with effect from the PEPP provider change date, stop accepting contributions paid to the PEPP account held with the

Transferring provider,

- on the effective date of the PEPP provider change date, transfer the assets (relevant amounts) from the PEPP account to the new account opened with Finax,
- close the PEPP account on the PEPP provider change date, provided that the Client has no outstanding liabilities.

If the Client requests the transfer of non-cash assets, the Client agrees that the Transferring provider shall:

- send Finax a list of existing assets that are being transferred in the case of a transfer of non-cash assets,
- and transfer the non-cash assets to the Client's account in Finax.

The Client agrees that Finax shall:

in line with the request, and to the extent that the information provided by the Transferring PEPP provider or the PEPP Client allows Finax as the receiving PEPP provider to proceed in this way, carry out all necessary preparatory steps to receive incoming contributions, and accept them with effect from the PEPP provider change date.

SIGNATURE

DATE

PLACE

FOR THE CLIENT

CONFIRMATION BY THE BROKER

WE CONFIRM RECEIPT OF YOUR REQUEST TO CHANGE PROVIDER.

DATE

PLACE

FOR THE BROKER

JURAJ HRBATÝ
FINAX, O.C.P., A.S.