

Application for Advance Withdrawal of Pension Benefits (Promotion of Home Ownership)

Pension benefits account number(s): _____

Mr. Ms. (hereinafter the "account holder")

Social security number:

Last name:

First name:

Street/No.:

Postcode/Town/Country:

Date of birth (dd/mm/yyyy):

Telephone:

Civil status (documents to be submitted depending on civil status)

Single

- Individual civil status certificate (issued no more than 3 months prior to date of withdrawal, if amount is CHF 10,000 or more)

Married or registered partnership

- Copy of passport or identity card of spouse or registered partner

Divorced or legally dissolved partnership

- Individual civil status certificate (issued no more than 3 months prior to date of withdrawal, if amount is CHF 10,000 or more)

Widowed

- Individual civil status certificate (issued no more than 3 months prior to date of withdrawal, if amount is CHF 10,000 or more)

Amount pledged (please enclose release of pledge)

Reason for withdrawal please check as appropriate:

For purchasing owner-occupied residential property

- Notarized purchase agreement (not older than 12 months) or draft purchase agreement (a draft agreement requires a repayment confirmation). If the agreement is older than 12 months, current excerpt from land register (also not older than 12 months)
- Approval letter from mortgage lender (property and mortgage number must be stated)

For building owner-occupied residential property

- Copy of land purchase agreement (not older than 12 months); if the agreement is older than 12 months, current excerpt from land register (also not older than 12 months); note: purchases of land only are not permitted
- Approval letter from mortgage lender (property and mortgage number must be stated)
- Building permit if account holder is the builder-owner, otherwise general contractor's or works contract

For repaying a mortgage on owner-occupied residential property

- Land record extract for proof of ownership (not older than 12 months)
- Confirmation of the mortgage provider with payment instructions for the current mortgage debt (not older than 6 months)

For renovating owner-occupied residential property

- Land record extract for proof of ownership (not older than 12 months)
- Tradespeople quotes (after approval by Foundation, the corresponding invoices must be sent to the Foundation for payment)

The account holder confirms:

- the accuracy and completeness of this application and the documents submitted;
- that the property in question is for his own use as a primary residence in his tax domicile;
- that the withdrawn retirement capital will be used for the aforementioned purpose;
- that he has not withdrawn any assets for residential property in the last five years.

If you have already made an advance withdrawal in the past 5 years, you will need to consult your tax office about the tax consequences.

Transfer of pension benefits

The withdrawal amount is calculated by the Foundation and communicated to the account holder.

Total amount (account will be closed)

Partial payment of CHF _____

If the required funds are not available in the pension benefits account, the pension benefits Foundation will sell a corresponding number of units following approval of the payment application. These units are selected at the pension benefits Foundation's discretion.

Name of bank:

IBAN/Account no.:

Account holder (seller, builder, lender, etc.)

Last name:

First name:

Value date (dd/mm/yyyy):

Important information

Please note that the Foundation is entitled to conduct further investigations and request the submission of additional documents. The Foundation charges a **fee of CHF 100 for processing** requests for advance withdrawal of pension benefits.

Signature

The undersigned account holder and, if applicable, his/her spouse or registered partner confirm(s) that the Foundation has informed them of the consequences of an advance withdrawal, specifically about the tax consequences.

Following the advance withdrawal, the Foundation is obliged to:

- Deduct federal and cantonal withholding tax from payments to persons who are domiciled abroad.
- Notify the Federal Tax Administration of payments made to Swiss residents (according to the Withholding Tax Act).

All listed reasons for payment can only be asserted with written approval from the account holder's spouse or registered partner.

Place/Date:

Signature of account holder:

Signature of spouse or registered partner:

X

X

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X _____

X _____