

OCCUPATIONAL PENSION INSURANCE

Application for an early withdrawal or a pledge

Company

Policy no.*

Insured person no.*

*Fields can be completed by Allianz Suisse Life.

INSURED PERSON

Surname

First name

Street, no.

Postcode, town/city

Date of birth

AHV no.

Tel. no.

E-mail

Single

Married since

Registered partnership since

Place of origin

Nationality

Are you currently fully capable of working?

Yes

No, degree of incapacity

%

Incapable of working since

Early withdrawals and pledges are permitted until the date on which you become entitled to disability benefits.

Have you arranged a pledge or withdrawn capital early from a previous pension fund for the purposes of home ownership?

No

Yes, pledge

Yes, early withdrawal

Date

Amount in CHF

Have you purchased tax-privileged benefits* in the pension fund within the last three years?

No

Yes

Date

Amount in CHF

* After a purchase, the benefits resulting from the purchase may not be drawn as a lump sum for a blocking period of three years. Lump-sum withdrawals are possible aside from these blocked benefits, but every withdrawal in the three years following a purchase will lead to the tax authorities retroactively revoking the tax deduction granted on the purchase. This tax practice also applies to holders of multiple pension relationships who made the purchase with another pension fund.

SPOUSE/REGISTERED PARTNER

Surname

First name

Date of birth

AHV no.

DETAILS OF PROPERTY

Single-family home

Condominium

Since when have you lived/from when will you live in the property?

Location (address) of property

FINANCING RESIDENTIAL PROPERTY FOR OWN USE

Early withdrawal

Pledge

Documents to be enclosed:

For the construction of residential property

Copy of the purchase agreement or current land register extract, copy of the definitive work contract

For the acquisition of residential property

Copy of the purchase agreement, if more than one year old: copy of the current land register extract

For the repayment of mortgage loans

Current mortgage confirmation, copy of the land register extract

For purchasing share certificates

Confirmation from the property developer, regulations of the housing cooperative, original share certificates

For renovations/conversions

Current land register extract, definitive work contract, definitive tradespersons' bills or general contractors' agreements

For transfer to a new property

Copy of purchase agreement/land register extract (old property), copy of purchase agreement after signing

For pledging benefits as per a pledge agreement

Pledge agreement, current land register extract or purchase agreement, confirmation of residence (new place of residence)

ACCOUNT DETAILS (please enclose a paying-in slip)

Postal account no.	Account holder
Name of bank	Postcode, town/city
IBAN and BIC	Account holder
Expected payment date	Desired amount in CHF

Please enclose a copy of a valid official identity document of the spouse or registered partner, such as a passport or identity card. For lump-sum payments of CHF 30,000 or more, the spouse's or partner's signature must be officially certified or he or she must present the official identity document and sign the form in person at an Allianz agency (with the exception of transfer to a new property).

CONFIRMATION OF USE

The undersigned recipient of the lump sum undertakes to use the amount as prescribed by the law on the promotion of home ownership (*Wohneigentumsförderungsgesetz*) as follows:

- For a building loan For a 1st mortgage For a 2nd mortgage
- For direct payment of the purchase price (full or partial)
- For repayment of mortgage loans (full or partial)
- For transfer to a new property

Restrictions:

The undersigned recipient of the lump sum undertakes not to:

- transfer the lump sum to the insured person's personal account or pay out the lump sum to him or her
- use the lump sum to finance regular maintenance of the residential property
- use the lump sum to pay off mortgage interest or similar

Place and date

Stamp and signature of the recipient of the lump sum (e.g. bank, notary)

ADDITIONAL INSURANCE

The insured person has the option of taking out additional insurance at his/her own expense in order to avoid a benefit reduction.

I would like advice on additional insurance for death and disability

SIGNATURE, COSTS AND FEES

To secure the repayment obligation, a note is made in the land register (restriction on sale). The associated costs will be charged directly by the land registry to the insured person making the application.

The pension fund charges an appropriate contribution to cover expenses related to processing the application (due upon submission of the application):

Early withdrawal: CHF 500

Pledge/transfer: CHF 300

The undersigned persons hereby declare that they acknowledge and agree to the rules set out above. They confirm the accuracy of the information provided on this application form and that the photocopies enclosed are copies of the original documents.

Place and date

Signature of the insured person
(applicant)

Signature of the spouse or
registered partner

Contribution to costs for the promotion of home-ownership

Einzahlung für / conto n./cont on. / Payment for

IBAN

Allianz Suisse
Life Insurance Company Ltd
8010 Zurich

CH79 0023 0230 2820 9901 A

MITTEILUNGEN / COMMUNICATIONS / COMUNICAZIONI/ COMMUNICATIONS

Name, Vorname / Nom, Prénom / Conome, Nome/ Last name, first name

Policy no. /

AHV no. /



Last name, first name

Policy no. /

AHV no. /

UBS AG
CH-8098 Zurich

CH79 0023 0230 2820 9901 A
Allianz Suisse
Life Insurance Company Ltd
8010 Zurich

80-2-2

UBS AG
CH-8098 Zurich

CH79 0023 0230 2820 9901 A
Allianz Suisse
Life Insurance Company Ltd
8010 Zurich

80-2-2

Contribution to owner-occupied
property promotion scheme

Last name, first name

Policy no.

AHV no.