

Occupational pension insurance – application for an early withdrawal or a pledge

Company

Contract no.*

Insured person no.*

*Fields can be completed by Allianz Suisse Life.

1. Insured person

Surname _____ First name _____
 Street, no. _____ Postcode, town/city _____
 Date of birth _____ AHV no. _____
 Mobile _____ E-mail _____

☐ Single ☐ Married since _____ ☐ Registered partnership since _____

Nationality(ies) _____ Place of origin _____

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Have you arranged a pledge or withdrawn capital early from a previous pension fund for the purposes of home ownership?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

2. Spouse/registered partner

Surname _____ First name _____
 Date of birth _____ AHV no. _____

3. Details of property

☐ Single-family home ☐ Condominium Since when have you lived/from when will you live in the property? _____

Address of property _____

4. Financing residential property for own use

<input type="checkbox"/> Early withdrawal	<input type="checkbox"/> Pledge	Documents to be enclosed:
<input type="checkbox"/> For the construction of residential property		Copy of the purchase agreement or current land register extract (no more than one year old at the time of application), copy of the definitive work contract
<input type="checkbox"/> For the acquisition of residential property		Copy of the purchase agreement, if more than one year old: copy of the current land register extract (no more than one year old at the time of application)
<input type="checkbox"/> For the repayment of mortgage loans		Copy of the purchase agreement, if more than one year old: copy of the current land register extract, current mortgage confirmation
<input type="checkbox"/> For purchasing share certificates		Confirmation from the property developer, regulations of the housing cooperative, original share certificates
<input type="checkbox"/> For renovations/conversions		Current land register extract, definitive work contract, definitive tradespersons' bills (no more than one year old at the time of application) or general contractors' agreements. Payment receipts from DIY stores are not accepted as proof
<input type="checkbox"/> For transfer to a new property		Copy of purchase agreement/land register extract (old property) (no more than one year old at the time of application), copy of purchase agreement after signing
<input type="checkbox"/> For pledging benefits as per a pledge agreement		Pledge agreement, current land register extract or purchase agreement

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 payouts abroad, withholding tax will be deducted from the requested amount.

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 first mortgage ☐ For a second 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

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

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

An early withdrawal or a pledge will change your BVG retirement benefits. This can lead to a shortfall in your pension coverage – and consequently to a lower standard of living after retirement. To ensure that you do not suffer any nasty surprises, we recommend our free pension check to all our customers. How can we contact you?

- ☐ By telephone ☐ By e-mail
- ☐ I do not want a free pension check
- ☐ Other

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. The undersigned persons confirm that the residential property will be used at their place of domicile or usual place of residence (own use). They confirm the accuracy of the information provided on this application form and that the photocopies enclosed are copies of the original documents.

Signature of the insured person (applicant)

Signature of the spouse or registered partner

8. Contribution to costs for the promotion of home ownership (WEF)

Collective Foundation BVG / Collective Foundation
for Supplementary Occupational Benefits:

Allianz Suisse Life Insurance Company Ltd, 8010 Zurich

UBS AG

IBAN CH79 0023 0230 2820 9901 A

Account no. 230-282099.01A

Reference

Surname

First name

Contract number

AHV no.

Cost contribution WEF

Collective Foundation Allianz Pension Invest:

Allianz Pension Invest, 8304 Wallisellen

UBS AG

IBAN CH30 0023 0230 6070 8101 M

Account no. 230-607081.01M

Reference

Surname

First name

Contract number

AHV no.

Cost contribution WEF