

## Occupational pension insurance Application for buying into the pension fund

Company	Contract no. *	Insured person no. *
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\* Fields may be completed by Allianz Suisse Life

### Details of the insured person

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

If you provide your e-mail address and do not wish to receive a paying-in slip, we will confirm the definitive maximum purchase amount by e-mail.

### Questions for the insured person

1. Do you have other vested benefits (vested benefits account / policy) or other pillar 2 assets that you have not paid in to the pension fund?

Yes  No

The current value of my assets is CHF

2. Are you also insured with another pension fund?

Yes  No

If yes: can you still buy into that pension fund?  Yes  No

If no: by how much do your current retirement assets there exceed the maximum possible retirement assets under the pension rules? CHF

3. Do you already receive a retirement pension or have you withdrawn retirement benefits as a lump sum?

Yes  No

If yes, underlying retirement assets	Date of early withdrawal
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Amount of lump sum / if pension, which capital is it based on?

4. Have you made an early withdrawal from a previous pension fund for the purposes of home ownership?

Yes  No

If yes, amount of early withdrawal	Date of early withdrawal
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If yes, have you already repaid this early withdrawal in full?

Yes  No

Date of repayment

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5. Do you have a restricted pension arrangement (pillar 3a)?

Yes  No

The current value is CHF

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6. Have you moved to Switzerland from abroad in the last five years?

(Answer only if you were never insured with a Swiss pension fund prior to your move)

Yes  No

Moved on (date)

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#### Data protection

Information on data protection, in particular on the uses and recipients of your data and on your rights, can be found in our data protection statement at [allianz.ch/privacy-policy](https://allianz.ch/privacy-policy).



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#### Signature

The insured person confirms that he/she has answered all questions completely and truthfully. In the case of future purchases, he/she must report any changes to the above information on his/her own initiative using a new form; otherwise, the pension fund may assume that the information is still correct. The pension fund accepts no liability if the information provided is not accurate, in particular for the tax consequences of any purchase. The insured person declares that he/she has read and acknowledged the following provisions and information. In all other respects, the insured person irrevocably declares that he/she will not rescind purchases owing to the partial or full non-recognition of tax deductibility or claim any compensation for damages that may result from the partial or full non-recognition of tax deductibility.

Place and date

Signature of the insured person

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**Statutory provisions**

Insured persons who have withdrawn pension fund capital early for the purposes of acquiring residential property must first repay this in full before purchasing pension benefits.

The benefits arising from the purchase may not be withdrawn as capital for a blocking period of three years. This applies in particular to capital payments for retirement benefits, early withdrawals for home ownership and cash payments as a result of becoming self-employed or leaving Switzerland permanently.

This restriction does not apply to purchases which make up for pension shortfalls resulting from a pension settlement on divorce.

Insured persons who move to Switzerland after 31 December 2005 and have never been a member of a Swiss pension fund cannot purchase benefits of more than 20% of their insured salary during the first five years.

Available pillar 3a assets are deducted from the maximum purchase amount to the extent that they exceed the maximum amount according to a table published by the Federal Social Insurance Office (for self-employed persons who were insured under pillar 3a instead of under pillar 2 for a certain period, a proportion of the pillar 3a assets will be factored into the purchase amount).

The purchase results in pension benefits being adjusted in accordance with the actuarial, regulatory and statutory provisions. The corresponding pension cover is acquired as soon as the purchase amount has been received by the Foundation. Once made, purchases are definitive, permanent and irrevocably allocated to the pension fund and may not be reimbursed.

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**Tax information**

The contributions to the pension fund made by employees and self-employed persons in accordance with the law and regulatory provisions are tax-deductible with respect to the direct taxes charged by the Swiss government, the cantons and the municipalities.

In addition, the payments to the collective foundation for buying into the regulatory benefits, for which the insured person receives a written confirmation, can be claimed as tax-deductible – subject to the practice of the respective tax authority – in the insured person's tax declaration.

From a taxation perspective, the blocking period for lump-sum withdrawals within three years of a purchase applies irrespective of whether the lump sum results from the most recent purchase or – where an insured person has several concurrent pension arrangements – whether the lump sum is withdrawn from one and the same pension fund or from another. If a withdrawal is nevertheless made during the blocking period, the tax deduction claimed on purchases is subsequently annulled by the competent tax authority by setting it off against the insured person's taxable income.

Depending on the respective canton's tax practice, the tax authority concerned may draw up a complete assessment of a person's complete pillar 2 pension situation so that the tax deductibility of the purchase made in the pension relationship will be recognised only to the extent that there is no overfinancing from other pension relationships.