

The independent pension platform

Application for a Withdrawal to Finance Home Ownership

Vested benefit account	Account number	
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Payment instructions	Amount to be transferred	
	<input type="checkbox"/> Maximum authorised withdrawal	<input type="checkbox"/> Other amount:
	Currency	Desired payment date
	<input type="checkbox"/> CHF <input type="checkbox"/> EURO <input type="checkbox"/> USD <input type="checkbox"/> other:	
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Client	Name	First name
	Street, N°	Postal code, place
	Country	Full working capacity
		<input type="checkbox"/> yes <input type="checkbox"/> no
	Phone	Civil status
		E-mail
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Payment instructions	Recipient (has to be the seller, creditor or mortgage lender)	
	Post office account	
	Bank	
	Clearing number/SWIFT	Account number/IBAN
	Account holder	Type of account (e.g. blocked account, building account)
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Purpose	I will use the withdrawal to	
	<input type="checkbox"/> acquire a residential property for my own use	<input type="checkbox"/> repay a mortgage loan
	<input type="checkbox"/> build a residential property for my own use	<input type="checkbox"/> acquire co-ownership of a residential property
	<input type="checkbox"/> finance renovations or conversions increasing asset value	(e.g. in a cooperative residential association)
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Prior withdrawals	I have already used funds from my pension assets for	
	<input type="checkbox"/> a withdrawal	
	<input type="checkbox"/> a pledge	
	Date	Amount in CHF
	Pledgee	
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Property	The residential property is <input type="checkbox"/> a one-family house <input type="checkbox"/> an apartment	
	located (or to be located) at my place of residence or my usual place of abode; I live (or will live) at the property. Address:	
	Street, N°	Postal code, place
	Country	
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Owner	I am (or will be)	
	<input type="checkbox"/> Sole owner	<input type="checkbox"/> Co-owner (% co-ownership: _____)
	<input type="checkbox"/> Joint owner with my spouse	<input type="checkbox"/> Owner of an independent and long-standing right to build a residence on leasehold property
	<input type="checkbox"/> Holder of an interest in a condominium property	(e.g. owner of a partial interest in a cooperative residential association)
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Costs/mortgage	Purchase price or construction price (for new acquisitions)	Mortgages/loans on the residential property
	CHF	CHF
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Land registry office	I consent to a filing with the land registry.	
	Registration (please specify: e.g. page of land register, cadaster, plot of land)	
	Land registry office: Full name and address	
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- Purchases**
- No purchases of occupational benefits were made in the last three years.
- In the last three years, the following purchases of occupational benefits were made:
(please attach the relevant certificates from your pension funds)

Date of purchase	Amount in CHF
Date of purchase	Amount in CHF
Date of purchase	Amount in CHF

These amounts may not be paid out before three years after the date of purchase. If a purchase was made, the corresponding benefits may not be withdrawn as a lump sum in the following three years. Please ask your tax office to inform you about the consequences of any lump sum withdrawals. N.B. The client alone is responsible for the tax effects resulting from any lump-sum capital withdrawals.

Attachments	Purchase of residential property for own use ¹	Authenticated sales contract Confirmation of use Land register extract (no older than 1 year) ²
	Construction of residential property for own use ¹	Building loan agreement Contract for work and labour Building permit Authenticated purchase agreement covering the land Confirmation of use
	Mortgage repayments ¹	Current statement of mortgage loan account Land register extract (no older than 1 year) ² Confirmation of use Residence certificate
	Co-ownership ¹	Share certificate (original) with regulations Confirmation of use Lease agreement
	Renovations ¹	Land register extract (no older than 1 year) ² Residence certificate Confirmation of order or contractors' invoices Confirmation of use
	Pledges ¹	Copy of pledge agreement Confirmation of use
	¹ For properties in an EU/EFTA member state or for buyers who are not Swiss nationals	Confirmation of departure from the local municipality Confirmation of residence abroad (no older than 6 months) Copy of passport or ID with legible signature
	² For properties in France	Extract from the «Bureau de conservation des hypothèques» (no older than 1 year)

For single persons, a certificate of civil status must be produced.

For married persons, the authenticated signature of the spouse or registered partner (Federal Law on Registered Civil Partnerships) is mandatory.

For divorced person or persons whose registered partnership has been dissolved by a court decision, a copy of the divorce decree or the decision dissolving the partnership must be produced.

For surviving spouses, a copy of the updated family record book must be produced.

- Reference**
- For further information about the encouragement of home ownership, see the relevant Fact Sheet.
For filings with in the land register, a copy of this application will be sent to the competent Land Registry office.

Declaration

I authorise the Foundation to charge the relevant lump-sum fees to my account in accordance with the Fee Schedule.

Signature

Place, date Client's signature

Place, date Partner's signature

Authentication of spouse's or registered partner's signature

Authentication in Switzerland: Partner banks, municipality, notary or attorney-at-law (with stamp, name and binding signatures)
Authentication abroad: Partner banks, notary, attorney-at-law or consulate (with stamp, name and binding signatures)