

Application for pension fund buy-in

Insured person

Last name	First name	Social insurance number
Address	City / postcode	Marital status

Type of buy-in (cross as appropriate):

- standard buy-in of CHF
- Repurchase after divorce or court ruling dissolving a civil partnership
- Buy-in for early retirement

Questions to be answered by the insured person:

1. Have all vested benefits been contributed?
 - Yes
 - No (please enclose corresponding statements of account)
2. Have you withdrawn part of your pension savings to finance residential property and have not yet repaid this amount?
 - Yes
 - No
3. Do you have one or more Pillar 3a tied pension products?
 - Yes Total pension savings stand at
 - No CHF as of
4. Are you already receiving a Pillar 2 retirement pension from a Swiss pension fund or have you already received a lump sum on retirement?
 - Yes What was the amount of the lump sum?
 - No CHF as of
5. Have you come to Switzerland from another country in the last five years?
 - Yes If so, when: Date on which you came to Switzerland
 - No

If so, were you previously covered by a Swiss pension fund?

 - Yes From until Name of
 - No pension fund

If buy-ins have been made, the resulting benefits may not be withdrawn from the pension plan in the form of a lump sum within the following three years.

In order to execute a buy-in, you must repay all withdrawals made in connection with the home ownership promotion scheme except in the case of a repurchase due to divorce or the dissolution of a civil partnership.

After this application has been submitted and checked, the pension fund will notify you of the maximum possible buy-in amount. In addition, the insured person will receive the corresponding paying-in slip.

The deposits must be remitted to the pension fund by **20 December so that they are effective for tax purposes for that year.**

Deposits made are credited to the non-obligatory part of the pension savings. Payments exceeding the maximum buy-in amount are reimbursed free of interest.

The insured person confirms that he or she has answered all questions to the best of his or her knowledge. The pension fund shall not be liable if any information provided proves to be incorrect.

Place and date

Signature of the insured person