



## Application for an advance withdrawal

Employer \_\_\_\_\_ Contract no. \_\_\_\_\_

### Personal details of insured person

Surname \_\_\_\_\_ First name \_\_\_\_\_

Date of birth \_\_\_\_\_ Social insurance no. 756. \_\_\_\_\_

Street/no. \_\_\_\_\_ Post code/city \_\_\_\_\_

Marital status  Single  Cohabiting  Married  Divorced  Widowed  
 Registered partnership  Legally dissolved partnership  Partnership dissolved by death

Tel. no. (daytime) \_\_\_\_\_

E-mail \_\_\_\_\_

Are you fully employable and/or capable of working?  Yes  No

Have you made an advance withdrawal in the last five years?  Yes  No

Have you already pledged any of your retirement benefits?  Yes  No

In the last three years have you voluntarily bought in to the pension fund?  Yes  No

### Purpose of advance withdrawal

- To set up residential property as builder-owner or as part of a contract for work and services (Enclosures: contract for building finance, contract for work and services, building plans, planning permission, confirmation of use from the bank, confirmation of place of residence)
- To acquire residential property (Enclosures: notarised contract of sale, confirmation of use from the bank, confirmation of place of residence)
- To amortise an existing mortgage (Enclosures: extract from land register, mortgage contract, confirmation of use from the bank, confirmation of place of residence)
- To acquire shares in a building cooperative (Enclosures: building cooperative regulations, rental agreement, participation certificates, confirmation of place of residence)
- To make an investment or carry out renovations/conversion which will increase the value (Enclosures: detailed building plan/renovation designs, extract from land register, confirmation of use from the bank, confirmation of place of residence, list of costs, quotations)

### Information on the advance withdrawal

I am applying for an advance withdrawal

of the maximum amount possible

of CHF \_\_\_\_\_

Date of the transfer of ownership \_\_\_\_\_

Desired payment date (earliest 1 month before transfer of ownership) \_\_\_\_\_

### Information regarding ownership status

- Sole ownership  
 Co-ownership of \_\_\_\_\_ %  
 Joint ownership

### Supplementary insurance

I would like to arrange a supplementary insurance policy  Yes  No

### Bank details/name of bank (please enclose payment slip)

Name of bank/post office \_\_\_\_\_  
Address of bank \_\_\_\_\_  
IBAN number \_\_\_\_\_ SWIFT / BIC \_\_\_\_\_  
Account holder \_\_\_\_\_

### Relevant authorities/land registry

Land registry \_\_\_\_\_ Post code/city \_\_\_\_\_  
Land register no. \_\_\_\_\_ Plot no. \_\_\_\_\_

### Notes/comments/declaration

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

In the event of insured persons who are married or living in a registered partnership, an advance withdrawal is permissible only with the written agreement of the spouse and/or registered partner. The signature of the spouse and/or registered partner must be notarised or witnessed by a member of HR services and confirmed accordingly.

We require single persons and persons not living in a registered partnership to provide a current certificate of civil status. This can be obtained from your relevant registry office.

I hereby confirm that I have read and understood the information sheet on advance withdrawals and that the advance withdrawal will be used for residential property that I shall be using personally.

I am aware that I cannot pay any tax liability incurred due to the advance withdrawal from the sum withdrawn.

Furthermore I consent for the Swisscanto 1e Collective Foundation to submit the declaration to be included as a note in the land register. The fee for entry and cancellation of the restriction on disposal will be incurred by myself.

\_\_\_\_\_  
Place, date

\_\_\_\_\_  
Signature of insured person

\_\_\_\_\_  
Signature of spouse/registered partner

Swisscanto 1e Collective Foundation  
P.O. Box  
8021 Zurich

\_\_\_\_\_  
Signature of witness/notary