

Voluntary purchase request (consider separate document)

Employer / pension fund

Pension plan

Category

Insured person

Name

First name

Date of birth

Civil status

- single
 married
 divorced
 widowed
 registered partnership
 dissolved partnership

Social security number

756.

street, No.

Postal code, place

Contact adress for queries during the day (e-mail or telephone number)

When changing jobs and joining the pension fund of the new employer, both the termination benefit from the previous pension fund and any other existing credit balances with 2nd pillar vested benefits institutions must be transferred, i.e. transferred to the new fund, in accordance with the legal provisions (Art. 4 para. 2bis FZG). In the case of former self-employed persons, the pension assets of the restricted pension plan (pillar 3a) must also be taken into account to a certain extent (Art. 60a BVV 2). Furthermore, if they move in from abroad, their purchasing options are restricted in the first five years after joining a Swiss pension fund (Art. 60b BVV 2). Please read the information sheet Voluntary Shopping carefully..

Do you have vested benefits accounts or policies under Pillar 2 or is there another pension plan with another foundation?

- no
 yes, I have the following credit balances:

Balance/Surrender value as at 31.12.	Name/address bank/insurance

Have you ever been self-employed?

- No
- Yes,
- but I still do not have any retirement accounts or policies under pillar 3a.
- I have the following Pillar 3a accounts/policies (please enclose excerpts/tax confirmations):

Balance/Surrender value as at 31.12.	Name/address bank/insurance

Promotion of home ownership

Have you made advance withdrawals from previous pension funds and/or vested benefit accounts or policies and not yet repaid them or not paid them back in full?

- No
- Yes (please attach the corresponding documents)

Have you moved from abroad in the last five years?

- no
- yes,
- I was previously (before my last move) insured in a Swiss pension fund
Date of entry into this pension fund: _____
(please enclose pension certificates and/or leaving statements)
- Date of entry into a Swiss pension fund after moving abroad: _____

I intend to make the following voluntary contribution:

Desired purchase amount: CHF _____

Intended date of purchase: _____

- Purchase of regulatory benefits to improve pension protection.
- Purchase to buy out the reduction in retirement benefits due to early retirement

I intend to take early retirement on: _____ at the age of: _____

I hereby confirm that I have read the Purchasing Information Sheet and that I have answered all the information on this purchasing application truthfully, completely and correctly. Any consequences resulting from incomplete and/or incorrect information are entirely my own responsibility.

Place and Date

Signature of the insured person