

Application for payment – conversion/renovation (encouragement of home ownership)

Note:

Pension assets may only be withdrawn to facilitate home ownership every five years.

Client

Client number	Plan number
First name	Surname
Marital status	Street, number
Postcode	Town
Date of birth	Social security number
Telephone number	E-mail

Information about the property

Street, number	Postcode, town
Country	Land register folio no.

Payment instruction

Withdrawal of the entire pension assets and closure of the pension relationship

I would like to make further payments to the Independent Pension Foundation 3a in the future:

Yes (An adviser should contact me regarding a reopening.)

No

Partial withdrawal/amount requested in CHF

Confirmation

I herewith confirm that...

the funds will be used solely for the above-mentioned property, which I occupy myself (principal residence).

I have the following ownership rights to the property:

sole ownership or co-ownership or joint ownership with the spouse/registered partner

the pension assets are not pledged and I have not withdrawn any pension funds to finance residential property in the last five years.

Documents to be submitted

- Copy of the Client's passport/ID (bearing a legible signature)
 - Copy of the extract from the land register (issued within the last 3 months)
 - Invoices and signed order confirmations (issued within the last year/no quotations)
 - *If not married or living in a registered partnership:*
Certificate of civil status/official confirmation of civil status (issued less than 1 month ago)
- or
- *People who are married or living in a registered partnership:*
Copy of the spouse/registered partner's passport/ID (bearing a legible signature)

Statement regarding the conversion or renovation work

We ask you to categorise your conversion or renovation work accordingly, to list it in detail and to submit it together with the invoices or signed order confirmations. Only invoices and signed order confirmations that were issued less than a year before the submission of a complete application will be accepted. *Quotations and sales slips will not be accepted as evidence.* The final assessment for the withdrawal of pension assets lies with the Foundation. The following list is only to help you.

Description	Early withdrawal possible	Early withdrawal NOT possible
Living area, cellar & attic (e.g. floors, walls, ceilings, doors)	x	
Bathroom and WC (e.g. sanitary installations, built-in cupboards)	x	
Kitchen (e.g. kitchen refurbishment)	x	
Heating, plumbing & sewer system (e.g. solar, boiler, burner, heat pumps, radiators, sewerage and water supply)	x	
Electrical installations (e.g. fuse board, wiring)	x	
Exterior I (e.g. façade, roof, windows, roller shutters and window shutters, balcony, sun blinds)	x	
Exterior II – has to be connected to the house (e.g. terrace incl. canopy/pergola, conservatory)	x	
Personal contributions and architects' fee		x
Lamps, furniture and electrical devices		x
Sauna, solarium and swimming pool		x
Exterior wall and fence		x
Garage and parking area		x
Garden, garden seating area and gardening		x

Transfer

Payment can only be made to an account in the Client's name

Beneficiary	IBAN
Name of bank	

I confirm that the information above is accurate and complete, as are the documents I have submitted. If the entire capital is being withdrawn, the pension account/securities account will be closed once the funds have been transferred. I permit the Independent Pension Foundation 3a Zurich to seek further clarification if necessary. At the same time, I issue the order to sell any securities investments in the amounts needed up to the payment date.

I acknowledge that the Independent Pension Foundation 3a Zurich must report the lump-sum withdrawal to the Federal Tax Administration (FTA). As a capital payment from the occupational pension, the lump sum withdrawal is taxable separately from other income (federal government, canton, local authority). Withholding tax will be deducted directly for persons residing outside Switzerland.

Place	Date	Signature of the Client
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Place	Date	Signature of spouse/registered partner
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Please send the form to:

Sending address:

Sending address:

Use this cover sheet to forward the documents in a window envelope.