



Checklist – evidence required for transfer of existing advance payment in connection with the encouragement of home ownership

Annexes

In accordance with the Ordinance on the Encouragement of Home Ownership you must provide the pension plan with proof that the criteria for an advance have been met.. The following documents must be submitted:	<input checked="" type="checkbox"/> Documents required:	Acquisition of residential property	Construction of residential property	Transfer to a vested benefits institution
<input type="checkbox"/> Application for the transfer of an existing advance in the context of the encouragement of home ownership		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> A copy of the current extract from the land register for the real estate (no older than one month) in which the original advance is invested, if the property transfer has already taken place . The extract from the land register can be obtained from the respective land registry for a fee.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	In this case no attachments are required
<input type="checkbox"/> Officially certified purchase contract (if available) or final draft contract <ul style="list-style-type: none"> <input type="checkbox"/> The date of the property transfer is visible on the purchase contract or <input type="checkbox"/> Confirmation of the date of the property transfer by the notary 		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Current marital status/civil status certificate (not more than one month old) for unmarried persons		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> A copy of an official document (passport/ID card) showing the signatures of the applicant and spouse or registered partner. A copy of a driving license is not sufficient.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Bank confirmation with the following information: <ul style="list-style-type: none"> <input type="checkbox"/> Confirmation that the original amount will be used for the purchase or the construction of the new property <input type="checkbox"/> Indication of the original amount to be invested in the new property <input type="checkbox"/> Indication of the new property in which the advance is to be invested <input type="checkbox"/> Confirmation that the new property is an owner-occupied residential property 		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Copy of receipt for cost contribution in accordance with the offer If the advance was made by Zurich Life Insurance Company Ltd, we will not charge the cost contribution.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	