

Application for the advance of pension funds for the encouragement of home ownership

Information about contract and insured person

Name of employer or foundation <input type="text"/>	Contract no. <input type="text"/>	No. AHV (13 digits) <input type="text"/>
Last name <input type="text"/>	First name <input type="text"/>	
Street/road, no. <input type="text"/>	ZIP code, town/city <input type="text"/>	
Private telephone number <input type="text"/>	Business telephone number <input type="text"/>	
Place of citizenship <input type="text"/>	Date of birth <input type="text"/> <input type="text"/> <input type="text"/> Day Month Year	
Marital status <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed <input type="checkbox"/> In a registered partnership <input type="checkbox"/> Dissolved partnership		
I am fully able to work/capable of gainful employment <input type="checkbox"/> Yes <input type="checkbox"/> No		Degree of remaining capacity for work or gainful employment in % <input type="text"/>

If an insured event occurs prior to payment of the advance (e.g. start/increase in disability or death), the application cannot be accepted.

Spouse or registered partner

Last name <input type="text"/>	First name <input type="text"/>
Place of citizenship <input type="text"/>	Date of birth <input type="text"/> <input type="text"/> <input type="text"/> Day Month Year

Requested advance

Amount requested in CHF <input type="text"/>	Probable date of withdrawal		
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Day	Month	Year

The advance will be used as follows

- | | |
|---|--|
| <input type="checkbox"/> Acquisition of residential property | <input type="checkbox"/> Acquisition of participation units in a cooperative housing association |
| <input type="checkbox"/> Construction of residential property | <input type="checkbox"/> Renovation/conversion and development of residential property |
| <input type="checkbox"/> Repayment of mortgage loans | |

Precise details of use

Precise address of the property for which the amount is being advanced

Payment instructions

Please transfer the advance amount as follows:

- in accordance with the enclosed bank confirmation
- to the following payment address*:

IBAN

Account in the name of

* Account holder Seller Construction company other

Supplementary insurance

To avoid any loss in coverage, we recommend that you seek pension provision advice.

Yes, I would like to be contacted by a Zurich advisor.

Confirmation by the insured person and the spouse or registered partner

By signing this document the undersigned confirm(s):

- that I/we agree with the advance;
- having read the „Encouragement of home ownership using funds from occupational pension plans“ booklet;
- that I/we occupy the property mentioned in the application or that this property is located at my/our domicile or regular place of residence;
- that I/we have not advanced/pledged pension assets for any other properties (occupational pension plan provisions may only be used for one residential property at a time);
- that I/we have understood that the regulatory plan benefits will be reduced by the advance in accordance with the quote;
- that I/we agree to the entry of the restriction on sale in the land register; the costs for the entry will be charged directly to the insured person by the land registry;
- that no purchases made within the last three years are included in the requested advance.

Kindly ensure that all the evidence required in accordance with the “Checklist – evidence required for advance payment of pension plan benefits in connection with the encouragement of home ownership” is complete prior to submitting your request.

Payment of the advance will only be made following a review of the documents and receipt of the cost contribution.

Place

Date

Day

Month

Year

Place

Date

Day

Month

Year

Signature of the insured person

Signature of the spouse or registered partner

If the residential property is **not** in Switzerland and the requested amount is greater than CHF 50,000, the authenticity of the signature of the spouse or registered partner must be certified by an official.

Confirmation of the authenticity of the signature must be made on the application. Such certification may be obtained for a fee from a notary or mayor against presentation of your passport, ID card or residence permit.

Certification by an official:

Place

Date

Day

Month

Year

Signature of the official