

# Home ownership assistance with the retirement savings account 3a

Please send to: PostFinance Retirement Savings Foundation 3a, Retirement savings account 3a, P.O. Box, 8098 Zurich

Please use block capitals. All references to persons apply to both genders.

## Account holder

<input type="checkbox"/> Mr	<input type="checkbox"/> Ms	<b>Retirement savings account no.</b>	_____
		AHV no. / social security number	_____
Name	_____	First name	_____
Street	_____	no	_____
Postcode	_____	Location	_____
Country	_____	Nationality	_____
Marital status	_____	Date of birth	_____
Telephone	_____		_____

## Details of the property (the property to be financed is my main place of residence)

Address of property	_____
Municipality (Postcode / Location)	_____
Date of transfer of ownership	_____

## Intended use (specifying the documents that must be submitted)

Documents in foreign languages must be submitted with a certified translation into German, French, Italian or English.

### ☐ Purchase

Note: Payout is possible up to a maximum of 18 months prior to the transfer of the ownership.

- Copy of officially authenticated purchase agreement or draft of purchase agreement (not older than three months) **and**
- Confirmation of how funds are to be used from mortgage creditor / notary (see page 3) or repayment guarantee of a notary **and**
- Copy of civil status certificate / personal marital status certificate (not older than three months) resp. marriage / partnership certificate or family record booklet **and**
- Copy of a signed form of identification of spouse / registered partner (e.g. passport or ID card)

### ☐ Construction

Note: Payout is possible up to a maximum of 18 months prior to the transfer of the ownership

- Copy of extract from land register (not older than three months) or copy of officially authenticated purchase agreement for building plot (no more than three months old) **and**
- Copy of building loan contract **and**
- Confirmation of how funds are to be used from mortgage creditor / notary (see page 3) or repayment guarantee of a notary **and**
- Copy of civil status certificate / personal marital status certificate (not older than three months) resp. marriage / partnership certificate or family record booklet **and**
- Copy of a signed form of identification of spouse / registered partner (e.g. passport or ID card)

### ☐ Mortgage repayment

- Copy of extract from land register (no more than three months old) **and**
- Copy of current certificate of residence (no more than three months old) or affidavit (notarized or officially authenticated self-affirmation) from the foreign country **and**
- Copy of valid mortgage contract / confirmation from mortgage lender **and**
- Confirmation of how funds are to be used from mortgage creditor / notary (see page 3) or repayment guarantee of a notary **and**
- Copy of civil status certificate / personal marital status certificate (not older than three months) resp. marriage / partnership certificate or family record booklet **and**
- Copy of a signed form of identification of spouse / registered partner (e.g. passport or ID card)

### ☐ Investments to enhance or maintain value

- Copy of extract from land register (not older than three months) **and**
- Copy of current certificate of residence (not older than three months) or affidavit abroad (notarized or officially authenticated self-affirmation) from the foreign country **and**
- Detailed order confirmation and / or invoices signed by the company (no quotes or receipts for cash payment, and not older than one year **and**
- Copy of civil status certificate / personal marital status certificate (not older than three months) resp. marriage / partnership certificate or family record booklet **and**
- Copy of a form of signed identification of spouse / registered partner (e.g. passport or ID card)

- ☐ **Share in cooperative housing association**
- Confirmation from the housing cooperative of share entitlement (amount) **and**
  - Copy of tenancy agreement **and**
  - Pay-in slip of cooperative residential association / tenant public limited company (payment to a private account is not possible) **and**
  - Copy of civil status certificate / personal marital status certificate (not older than three months) resp. marriage / partnership certificate or family record booklet **and**
  - Copy of a form of signed identification of spouse / registered partner (e.g. passport or ID card)

#### Application

- ☐ Withdrawal of all retirement assets
- ☐ Partial withdrawal of retirement assets in CHF \_\_\_\_\_

Withdrawals for residential property can be made every 5 years and up to 5 years before reaching regular AHV retirement age.

- ☐ Do not close retirement savings account

Date of payment \_\_\_\_\_

Please note that only dates in the future (max. 3 months) may be specified and can be complied with only if the foundation has received all necessary documents by this date.

#### Transfer

- ☐ to my postal account: \_\_\_\_\_

- ☐ to the following bank

Bank's name and address \_\_\_\_\_

Bank clearing no. \_\_\_\_\_

IBAN \_\_\_\_\_

Last name, first name of account holder \_\_\_\_\_

**Investment funds at the PostFinance Retirement Savings Foundation 3a will be sold to the extent necessary by the payment date. A one-off processing fee of CHF 200 will also be deducted directly from the outpayment amount.**

**For transfers to a foreign bank please enclose detailed payment instructions (IBAN or SWIFT). The transfer will be made in Swiss francs (CHF).**

#### Processing time

The time it takes to process an application for home ownership assistance depends on the completeness and correctness of the documentation provided and the time required to clarify the application.

#### The account holder hereby confirms

- the correctness and completeness of this application and the documents submitted;
- that the intended use as defined by the Swiss Federal Ordinance on the Tax Deduction of Contributions to Recognised Pension Plans, Article 3(3) and Article 5, BVV3, and by the Swiss Federal Ordinance on the Encouragement of the Use of Vested Pension Accruals for Home Ownership (WEFV) of 3 October 1994 will be adhered to, and the disbursed retirement assets will be used exclusively for the above property for own use (principal residence);
- that should the transfer of ownership not take place, the PostFinance Retirement Savings Foundation 3a is entitled to order the mortgage creditor / notary to transfer the disbursed retirement assets back to the retirement savings account;
- that it has been noted that taxation of the anticipated withdrawals shall not be inspected by the PostFinance Retirement Savings Foundation 3a and the account holder is advised to have the taxation of several anticipated withdrawals inspected by the relevant tax office in advance;
- that the PostFinance Retirement Savings Foundation 3a is entitled to make additional enquiries should this prove necessary;
- that it has been noted that a processing fee of CHF 200 will be charged. The fee applies to each anticipated withdrawal and account holder.

Location

Date

Signature of pension fund member  
(Include a copy of a current form of identification, e.g. passport)

Location

Date

Signature of spouse / registered partner

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Please leave empty

Date

Customer advisor

# Confirmation of intended purpose of early withdrawal of retirement assets as part of the home ownership assistance



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**This form must be filled in and signed by the mortgage creditor / notary.**

## Account holder

<input type="checkbox"/> Mr	<input type="checkbox"/> Ms	Retirement savings account no.	_____
		AHV no. / social security number	_____
Name	_____	First name	_____
Street	_____	no	_____
Postcode	_____	Location	_____
Country	_____	Nationality	_____
Marital status	_____	Date of birth	_____
Telephone	_____		_____

## Details of payment

- ☐ Purchase of property
- ☐ Construction of property
- ☐ Mortgage repayment

## Details of the property (the property to be financed is my main place of residence)

Address of property \_\_\_\_\_

Municipality (Postcode / Location) \_\_\_\_\_

## Please transfer the pension assets as follows:

Amount \_\_\_\_\_

Bank's name and address \_\_\_\_\_

\_\_\_\_\_

Bank clearing no. \_\_\_\_\_









Account number / IBAN \_\_\_\_\_

Account holder \_\_\_\_\_

Name of client advisor \_\_\_\_\_

Tel. of customer advisor \_\_\_\_\_

We hereby confirm to the PostFinance Retirement Savings Foundation 3a that the benefits from the PostFinance Retirement Savings Account 3a shall be used exclusively for the purchase, construction or mortgage repayment of the above-mentioned property. The account holder has no access to the retirement assets until transfer of ownership.

Location	_____	Location	_____
Date	_____	Date	_____
			
			
Stamp and signature		Stamp and signature	