

# Home ownership assistance with the retirement savings account 3a

Please send to: PostFinance Retirement Savings Foundation 3a, P.O. Box, 4002 Basel, Switzerland

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

## Account holder

Mr      Ms     Retirement savings account no. \_\_\_\_\_

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 \_\_\_\_\_

No. of page in land register \_\_\_\_\_

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

## Ownership structure

Sole ownership      Building lease

Joint ownership (spouses/registered partners)      Co-ownership / share in per cent \_\_\_\_\_ %

Date of transfer of ownership \_\_\_\_\_

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

- Purchase**
- Copy of officially authenticated purchase agreement or draft of purchase agreement (no more than three months old) **and**
  - Confirmation of how funds are to be used from mortgage creditor/notary (see page 3) or repayment guarantee of a notary **and**
  - Signature and copy of a form of identification of spouse/registered partner (e.g. passport or ID card)
- Construction**
- Copy of extract from land register (no more than three months old) 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**
  - Signature and copy of a 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**
  - Signature and copy of a 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 (no more than three months old) **and**
  - Copy of current certificate of residence (no more than three months old) or affidavit abroad (notarized or officially authenticated self-affirmation) from the foreign country **and**
  - List of investments and detailed, signed order confirmation/invoices (no quotes or receipts for cash payment, and no more than one year old) **and**
  - Signature and copy of a form of identification of spouse/registered partner (e.g. passport or ID card)
- Share in cooperative housing association**
- Confirmation from the housing cooperative of share entitlement **and**
  - Copy of tenancy agreement **and**
  - Signature and copy of a form of identification of spouse/registered partner (e.g. passport or ID card)

## Application

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

Early withdrawal to buy property is possible only up to 5 years before reaching the legally defined old-age insurance 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 \_\_\_\_\_

Name, First name 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.**

## 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)

Signature of spouse/registered partner \_\_\_\_\_

If you are not married and not in a registered partnership, please include an official document confirming your marital status (no more than one month old).

If you have divorced or had your partnership legally dissolved within the past six months, also enclose a copy of the legally binding and complete divorce or dissolution judgment (foreign divorce judgments must be recognized and enforced by a Swiss court).

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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

Please send to: PostFinance Retirement Savings Foundation 3a, P.O. Box, 4002 Basel, Switzerland

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

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

## Account holder

Mr       Ms      Retirement savings account no. \_\_\_\_\_

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 \_\_\_\_\_

No. of page in land register \_\_\_\_\_

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 \_\_\_\_\_ Date \_\_\_\_\_

Stamp and signature \_\_\_\_\_

Stamp and signature \_\_\_\_\_