

PostFinance Retirement Savings Foundation 3a Application for a pillar 3a purchase



Please complete in block capitals. References to persons apply to all genders.

Pension holder

Retirement savings account no.	<hr/>		
AHV no. / social security number	<hr/>		
Are you affiliated with a pension fund (pillar 2)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Last name	<hr/>	First name	<hr/>
Date of birth	<hr/>	Telephone	<hr/>

Preconditions

The following preconditions apply so that you can make subsequent purchases into pillar 3a:

- A professional income subject to AHV contributions must have been earned in Switzerland in both the year in which the purchase takes place and the year in which the subsequent purchase is made.
- In the year in which the purchase is made, the statutory maximum amount must be paid in full.
- Up to now, no retirement benefits – neither from an account nor an insurance solution – may have been received from pillar 3a.
- No purchases have yet been made for the selected year of purchase.
- A purchase can be made up to 10 years retroactively, up to a maximum of the statutory maximum amount for employed persons with a pension fund for each year. The figure valid in the year of the purchase is applicable. This also applies to pension holders who are working but are not affiliated with a pension fund (e.g. people who are self-employed). Gaps in contributions before 2025 cannot be filled with a purchase.

Self-declaration of pension holder

To make a purchase, the following preconditions must be met:

Current year (please tick)

- ☐ Yes, I earn an income subject to AHV in the current year.
- ☐ Yes, I paid in the statutory maximum amount for pillar 3a in the current year or will pay it in this year.
- ☐ Yes, I have not yet received any retirement benefits from pillar 3a.

Purchase year (please tick)

Year for which you want to make a subsequent purchase into pillar 3a.

- ☐ Yes, I earned income subject to AHV contributions in the year concerned.
- ☐ Yes, I have not yet made any purchases for the year in question.

Details of the desired purchase into pillar 3a

The purchase applies to the year*:	<hr/>
Amount of 3a inpayments already made in the selected year:	CHF <hr/>
Desired purchase amount:	CHF <hr/>
The amount of the maximum possible purchase corresponds to the statutory maximum amount for the current year for employed persons with a pension fund.	
I was affiliated with a pension fund in the selected year.	<input type="checkbox"/> Yes <input type="checkbox"/> No

* A separate "Application for a pillar 3a purchase" form must be completed for each year.

Payment details

Only the following IBAN is to be used to transfer the purchase to pillar 3a: CH14 0900 0000 1667 4017 8,
PostFinance Retirement Savings Foundation 3a, Aeschenvorstadt 1, 4002 Basel

To ensure correct entry, please enter your first name and last name, your retirement savings account number and the amount and year of the purchase in the payment note.

Approval

- The PostFinance Retirement Savings Foundation 3a will check your application. If the conditions for a purchase into pillar 3a are not met, please contact the PostFinance Retirement Savings Foundation 3a.
- The PostFinance Retirement Savings Foundation has approved the application for the 3a purchase.
- Purchases must reach the foundation by the end of November of the current year at the latest to ensure that they can be entered and taken into account in the tax certificate.

Pension holder's signature

- I hereby confirm that the information provided is correct and complete;
- I authorize the PostFinance Retirement Savings Foundation 3a to make further enquiries.

Location _____

Date _____

 _____

Pension holder's signature

Please send the form to:

PostFinance Retirement Savings Foundation 3a
Retirement savings account 3a
P.O. Box
8098 Zurich