

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

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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.	_____
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 _____