

# Purchase

In the event of a job change and inclusion in the employee benefit scheme of a new employer, the departure benefits of the previous employee benefit scheme and any other existing credit balances at pillar 2 vested benefits institutions must be transferred, i.e. contributed to the new pension fund, in accordance with the statutory provisions.

Since January 1, 2006, such vested benefits assets, even if they are not subject to the obligation to transfer, i.e. are independent of the change in job, must be considered voluntary purchase benefits. Furthermore, the pension plan assets of the restricted pension plan (pillar 3a) must be taken into account to a certain extent. In addition, the purchase possibilities in the case of a move from abroad after January 1, 2006 are limited. Any early withdrawal for the promotion of home ownership must also be repaid before a purchase can be made.

Benefits that result from the purchase may not be drawn in the form of capital within three years after purchase.

## Details on insured person

Employer	Portfolio number
_____	_____
Last name	First name
_____	_____
Street / no.	Zip code / city
_____	_____
Date of birth	Social security number (13 digits)
_____	756.
Email	_____
_____	

**It is mandatory that a current purchase calculation for all pension fund relationships be enclosed with each purchase form.**

► **In this connection, I confirm the following:**

## Vested benefits accounts or policies

- There are no vested benefits accounts or policies for pillar 2.
- There are the following vested benefits accounts or policies for pillar 2 at vested benefits institutions (please enclose statements):

Bank / insurance company	Balance / surrender value as of December 31, _____ (previous year)
_____	CHF
Bank / insurance company	Balance / surrender value as of December 31, _____ (previous year)
_____	CHF

### Pillar 3 accounts or policies

Total assets in all pillar 3 accounts / policies  
Balance / surrender value as of  
December 31, \_\_\_\_\_ (previous year):

CHF

### Additionally in the case of a move from abroad

- I have not moved here from abroad within the last five years.
- I moved here on \_\_\_\_\_.
- I was insured in the past at a Swiss employee benefit scheme.  
(Please enclose insurance certificates and / or departure settlements.)

### Additionally for early withdrawal related to the promotion of home ownership

- I have not made an early withdrawal related to the promotion of home ownership.
- I have made an early withdrawal related to the promotion of home ownership:

Date

Amount

CHF

- I have made a repayment of the withdrawal related to the promotion of home ownership:

Date

Amount

CHF

### Additionally if you are over the age of 55 at the time of the purchase

- I have already drawn retirement benefits (capital payout or pension).
- I am currently drawing retirement benefits (pension).
- I have not yet drawn retirement benefits (capital payout or pension).

## Tax repercussions

The calculation of the purchase amount is based on the information about the insured person and the data that the employee benefit scheme has at its disposal.

Untrue or incomplete information can have tax consequences. The Katharinen Pensionskasse II does not assume liability for any tax assets or tax penalties.

The tax deductibility of the purchase contributions and buyout contributions made is based on the federal and cantonal tax regulations. The Katharinen Pensionskasse II does not assume any guarantee for the deductibility of such contributions and explicitly rejects any responsibility.

## Signature

---

Place, date

---

Signature of the insured person

Please send the completed form to the following address: **Allvisa Services AG, Karina Togni, PO box, 8027 Zurich**