

Early withdrawal related to promotion of home ownership / pledge

Details on insured person

Employer

Last name

Street / no.

Date of birth

Email

Portfolio number

First name

Zip code / city

Social security number (13 digits)

756.

Date of departure

The insured person is fully employable

Yes No

The insured person is married / in a registered partnership

Yes No

Last name of spouse / registered partner

First name of spouse / registered partner

Have you made a pension purchase in the last three years?

Yes No

► If yes:

Date

Amount

CHF

Name of employee benefit scheme

Early withdrawal

I request an early withdrawal

By

Amount

CHF

or the maximum permitted amount

Name of the bank

Beneficiary

PC account or IBAN

Pledge

I request a pledge

By

Amount

CHF

or the maximum permitted amount

Last name of pledgee

First name of pledgee

Street / no. of pledgee

Zip code / city of pledgee

Land registry office

I am in agreement with the entry of the disposal restriction for Katharinen Pensionskasse II, c/o Allvisa Services AG, PO box, 8027 Zurich, in the land registry office and will pay the registration fees directly to the land registry office.

Name of land registry office

Street / no. of the land registry office

Zip code / city of land registry office

Land registry no.

Cadaster / plot

I will be: Sole owner Co-owner (share in %: _____)

Total owner with spouse / registered partner

Owner of a share certificate for housing cooperatives or a similar investment

Past use

Funds from my occupational pension plan have: already been withdrawn early pledged

► If yes:

Date

Amount

CHF

Name of pension fund institution

Property

Address, no. of the property

Zip code, city of the property

- Intended use:
- Purchase of residential property
 - Construction of residential property
 - Investment in residential property
 - Redemption of mortgage loans
 - Acquisition of share certificates in a housing cooperative
 - Acquisition of equities in a tenant stock corporation
 - Renovation of residential property

In the case of residential property, it is: an apartment condominium ownership a single-family home

Moving date

- The property is or will be my main place of residency and occupied by myself.

Enclosures

Upon early withdrawal

Purchase

- Purchase agreement or extract from the land register
- Loan agreement
- Bank confirmation stating that the early withdrawal is solely intended for this purpose

Issuance

- Purchase agreement (land) or extract from land register (land)
- Loan agreement (bank loan)
- Work contract
- Definitive building permit with certificate of legal redress

Redemption/mortgage loan

- Current land register extract
- Current mortgage account extract

Renovation

- See redemption; additionally: renovation documents (cost estimate, offers, plans, building permit, etc.), bank confirmation stating that the early withdrawal is solely intended for this purpose

Acquisition of share certificates

- Original share certificates
- Confirmation of housing cooperative

Always enclose for the cantons of Ticino and Wallis

- Extract of cadaster map

In the case of a pledge

Purchase

- Purchase agreement or extract from the land register
- Pledge agreement with the bank (notice of pledge)
- Loan agreement

Issuance

- Purchase agreement (land) or extract from land register (land)
- Loan agreement
- Work contract
- Definitive building permit with certificate of legal redress
- Pledge agreement with the bank (notice of pledge)

Renovation

- Current land register extract
- Current mortgage account extract
- Pledge agreement with the bank (notice of pledge)
- **Additionally:** renovation documents (cost estimate, offers, plans, building permit, etc.)

Signatures

Place, date

Signature of the insured person

Place, date

Signature of spouse / registered partner

► **Important: The signature of the spouse or registered partner must be officially certified (by municipality or notary) on the separate early withdrawal agreement.**

Information

If pension purchases have been made, the resulting amount may not be withdrawn in advance within the next three years. If early withdrawals have been made for residential property, a purchase may not be made until the early withdrawals have been repaid. This does not apply

- in cases in which redemption is no longer permissible, provided that the purchases together with the early withdrawals do not exceed the maximum benefits permitted in the regulations;
- to re-purchases as part of divorce/court dissolution of the partnership.

We will send a copy of this request to the responsible land registry office for inclusion in the land register.

We would, of course, like to handle your order as quickly as possible. We can only do this

- if your information is complete and
- if you have submitted all the required enclosures to us.

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