

Purchase calculation request

Company _____
 Policy no. _____
 Plan _____

Please answer the following questions in full for the definitive calculation of your purchase gap.

1. Personal details of the insured party

Last name _____ First name _____
 Street/no. _____ Postcode, town/city _____
 NI no. 756. _____ Date of birth _____
 Telephone _____ Email _____

2. Vested benefits assets

When changing jobs and joining your new employer's pension fund, both the vested benefits from the previous pension fund and any further existing assets with second pillar vested benefit institutions must be transferred to the new pension fund in accordance with legal requirements. Assets in vested benefits accounts/policies that are not transferred are deducted from the maximum possible purchase amount.

Do you have further assets in the second pillar in vested benefits accounts, vested benefits policies or with another pension fund? yes no

If so:

Name/address of the bank/insurer	Amount of vested benefits in CHF	As of value date
_____	_____	_____
_____	_____	_____
_____	_____	_____

3. Home ownership assistance

A purchase of additional benefits from the pension fund is only possible once any early withdrawals for home ownership have been paid back in full.

Have you made early withdrawals from previous pension funds and/or from vested benefits accounts or policies and not yet paid these back at all or in full? yes no

If so: Name of the pension funds and/or vested benefits institutions in question

Early withdrawal on	Amount	Repayment on	Amount
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

4. Self-employment

If you have previously been self-employed, part of any pillar 3a assets in existence may have to be credited to the purchase amount.

Have you ever been self-employed since 1/1/1985? yes no

If so: Name of the pension funds and/or vested benefits institutions in question

There are **no** vested benefits accounts or policies under the restricted pillar 3a

The **following** pillar 3a accounts/policies exist

Name/address of the bank/insurer	Amount of vested benefits in CHF	As of value date
_____	_____	_____
_____	_____	_____
_____	_____	_____

5. Immigration from abroad

For people who have immigrated from abroad and have never previously belonged to a pension fund in Switzerland, the annual purchase amount in the first five years must not exceed a maximum of 20% of the insured salary as defined in the regulations.

If yes

Have you immigrated to Switzerland from abroad since 1/1/2006? yes no

Date of immigration _____

Have you ever previously been insured in a pension fund in Switzerland? yes no

Please enclose insurance certificates and/or leaving settlements

6. Notes

- Please note that it is no longer possible to fully or partially withdraw retirement assets as a lump sum within a blocking period of three years after a purchase of additional benefits without incurring adverse tax consequences.
- Any missing contribution years must first be funded. Any purchase amounts paid in excess of this shall be used for the purchase for early retirement.
- If you do not take early retirement, the regulatory benefit target may only be exceeded by a maximum of 5%. Retirement assets accrued beyond this limit pass to the pension fund when they become due.
- The retirement assets resulting from the purchase for early retirement are paid out as a lump sum in the event of death and paid as a lump sum or pension in addition to the other benefits in the event of retirement. The amount of the benefits already previously insured does not change as a result of the purchase for early retirement.

Otherwise the provisions of the regulations apply.

7. Confirmation

I confirm I have been informed that the calculation of the purchase amount is made on the basis of information I have provided and the data available to the pension fund. The contributions made for the purchase of contribution years are tax deductible; the federal and cantonal tax regulations apply. I have taken note that any omission or inaccuracy in the above information may have tax implications, for which I alone bear responsibility.

Place and date

Signature