

Application for early withdrawal

Promotion of home ownership with funds from the occupational pension scheme

Employer **Contract no.**

Insured Person

Mr Ms
 Surname First name
 Street Postcode, Place
 Telephone E-Mail
 Date of Birth Insured no.

Are you fully able to work? Yes No

Marital status Single Married Separated Divorced Widowed

Documentation: copy of marriage certificate or family registration certificate, copy of divorce decree absolute

Have you ever requested an advance withdrawal in the past? No Yes, Date Amount

Have you requested a purchase of additional benefits in the past three years? No Yes, Date Amount

Request for advance withdrawal (min. CHF 20,000)

Amount CHF or max. amount available

Preferred date of advance withdrawal

Bank details for payment

Name Contact person
 Street Telephone
 Postcode, Place E-Mail
 IBAN

(Bank details of the vendor, the mortgage company or of the residential property builder) No direct payment to the insured person!

Purpose of advanced withdrawal: Construction of residential property as the building's owner, or under a contract for work and services
 Conversion/renovations (only possible for investments that increase / maintain the value)
 Purchase of existing residential property
 Repayment of the building loan in order to acquire home ownership
 Repayment of a mortgage on my own residential property
 Purchase of share certificates in a residential building cooperative

Property Single family house Apartment block Apartment
 Street Folio
 Postcode, Place Cadastre no.
 Sole ownership Joint ownership (husband and wife only)
 Co-ownership Distinct and permanent building right
 Moving-in date

Costs / Mortgage

Purchase price, respective price of construction	CHF	
Mortgage / Loan on the residential property	CHF	

Land registry in charge

Name		Telephone	
Street		Postcode, Place	

Personal use: The property is occupied by me / my family as my / our domicile or normal place of residence.

Documentation: domicile acknowledgement (available from municipality of domicile)

No financing for secondary or holiday residences!

Important:

Payment for purchase of building plot or for financing mortgage interests is not possible.

According to the legal regulations the advance withdrawal is to be finalized within 6 months following submission of the completed application, together with all required documents.

For construction or purchase of residential property, the advance withdrawal can only be finalized after transfer of the ownership in the land register.

For construction or purchase of residential property abroad, the advance withdrawal will be finalized as soon as we are in possession of the acknowledgement of the new domicile.

I am aware that Tellco pk will charge CHF 400 to process this application. I hereby declare that I am aware of the information relating to the advance withdrawal. I accept that the restriction on alienation is noted in the land register in accordance with art. 30 e LPP. Tellco pk will assume the fee for this note.

Place, Date	certified signature* Insured Person	certified signature* Spouse

* Through the notary or the municipality.

Documents to be submitted for the application for early withdrawal

Preparation

- Purchase contract or land registry record*
- Contract for work and services
- Building permit with certificate of appeal
- Confirmation of residence (after moving in)

Purchase

- Purchase contract or land registry record*
- Confirmation of residence (after moving in)

Amortisation of a mortgage

- Current land registry record*
- Current confirmation of residence
- Confirmation from the bank regarding the mortgage and that this can currently be amortised by the aforementioned amount, incl. IBAN / payment details

Purchase of shares

- Original shares
- Confirmation and regulations of the housing association

Conversion/renovations

- Current land registry record*
- Current confirmation of residence
- Confirmation from the bank regarding the mortgage and that this can currently be amortised by the aforementioned amount, incl. IBAN / payment details
- Documents concerning the conversion (quotations, plans, building permit, etc.)

If the property is located abroad or the buyer does not have Swiss citizenship:

Corresponding officially certified documents, copy of passport / ID and copy of foreign national's ID document

* For properties in France: relevé de propriété.