

Purchase form

(Purchase of contribution years and increases in benefits and also of early retirement)

Employer	_____	Contract No.	_____
Surname	_____	First name	_____
Street	_____	Postcode/Town	_____
Date of birth	_____	Material status/Date	_____ / _____
E-Mail	_____	Phone	_____

To enable us to carry out a purchase calculation, we kindly ask you to answer the following questions in full and to return the form to us, duly signed.

- Do you have any other vested benefits accounts or policies which you have not yet contributed? yes no
(Applies to vested benefits accounts and policies or a termination benefit from the previous pension fund)
– If so, how high is the current sum total (account + deposit)? CHF _____
- What is the amount of your savings (account + deposit) in pillar 3a as at 31 December of the previous year? CHF _____
- Have you made an early withdrawal for home ownership as part of Pillar 2 which you have not yet paid back? yes no
- Do you draw a retirement pension from a pension fund or have you already had retirement capital paid out to you? yes no
(If so, please enclose the statement from the pension fund)
- Are you resident abroad (cross-border commuter) or have you moved from abroad and joined a Swiss pension fund within the last 5 years for the first time? yes no
– If so, when? First entry date: _____

Confirmation

I confirm that all the information provided in answer to these questions is true and correct, and that I have taken due note of the Information Sheet on the purchase of contribution years.

Date

Signature of insured person