

**Application for early withdrawal for home ownership purposes (WEF)**  
(This form is to be completed by the insured person)

**1. Insured person**

Surname \_\_\_\_\_

First name \_\_\_\_\_

Street / no. \_\_\_\_\_

Country, post code,  
town \_\_\_\_\_

Date of birth \_\_\_\_\_

I am married / in a registered partnership

yes  no

I am fully fit for work

yes  no

Spouse / registered partner

Surname \_\_\_\_\_

First name \_\_\_\_\_

**2. Intended purpose**

I want to use the funds for

- |  |   |
|--|---|
| <input type="checkbox"/> purchase of a property to live in     | <input type="checkbox"/> participation in property ownership            |
| <input type="checkbox"/> construction of a property to live in | <input type="checkbox"/> purchase of shares in housing association      |
| <input type="checkbox"/> repayment of a mortgage loan          | <input type="checkbox"/> conversion / renovation of property to live in |

**3. Amount for early withdrawal**

- I request the early withdrawal of CHF .....
- I request the early withdrawal of the maximum possible amount.

**4. Address for payment (name and address of bank)**

Please enclose a confirmation from the bank with precise details of the account and the intended purpose.

**5. Deadline**

- The transfer shall take place on .....
- I shall announce the desired date of transfer.

**6. Conditions**

I confirm that

- |   |  |
|---|--|
| <input type="checkbox"/> my occupational benefits are not pledged.                                  | <input type="checkbox"/> I have already made an early withdrawal of CHF ..... on ..... |
| <input type="checkbox"/> I have not made any voluntary extra contributions in the last three years. | <input type="checkbox"/> I made a voluntary extra contribution of CHF ..... on .....   |

**7. Property**

The property for my personal use is

an apartment  a house

Lived in by me from / since

Land register no.

Parcel no.

Address

Post code / town

**8. Land register office** (full name, street, post code and place of land register office responsible)

The insured person agrees to the entry of the sale restriction according to Article 30e Paragraphs 1 and 2 BVG and confirms that the fees for entering and cancelling the sale restriction shall be settled directly.

**9. Owner**

I am or shall become according to the purchase agreement / land register entry

sole owner  co-owner (share in % .....)  
 full owner with spouse / registered partner  tenant in a housing association with share certificates

The property transfer takes place on .....

**10. Purchase price**

Purchase price or construction costs: CHF .....

**11. Mortgages / loans**

The property is not or will not be encumbered with mortgages / loans.  
 The property is or will be encumbered with the following mortgages / loans:  
 Lender (name, street, post code and town)

Amount: CHF .....

**12. Note**

After an early withdrawal for home ownership purposes the insured benefits in the event of retirement, disability and death are reduced according to the actuarial principles of the Pension Fund. To avoid any resulting gaps in insurance cover, a special voluntary top-up insurance may be concluded, the premium for which shall be borne by the insured person.

### 13. Confirmations

- I have read and taken note of the "Leaflet on early withdrawal for home ownership purposes (WEF)".
- I am aware that, after withdrawal, the withdrawn sum first has to be repaid in full before I can pay in any voluntary extra contributions – should there be any such provision for voluntary extra contributions in the regulations.
- I realize that the withdrawn sum must be taxed. I have to pay the resulting taxes out of private assets.
- I am familiar with my legal obligations with regard to repayment.
- The sale restriction is entered in the land register by the Pension Fund. The resulting costs shall be borne by me.

\_\_\_\_\_  
Place and date

\_\_\_\_\_  
Signature of insured person

\_\_\_\_\_  
Signature of spouse or  
registered partner

### Enclosures

#### In all cases

- Confirmation from the bank with precise details of the account and the intended purpose

#### For purchase of property

- Copy of the publicly authenticated purchase agreement

#### For construction of property

- Copy of the publicly authenticated purchase agreement of the land  
 Building permit  
 Contract for work and services

#### For repayment of mortgage loan

- Extract of current land register entry  
 Loan agreement  
 Extract of current mortgage lender's account

#### For participation in property / purchase of shares

- By-laws and regulations  
 Confirmation of housing association regarding purchase of share certificate  
 Share certificate to be filed with the Pension Fund

#### For conversion or renovation of property

- Extract of current land register entry  
 Estimation of costs  
 Building plans  
 Confirmation of bank incl. amount

Current documentary evidence must not be more than six months old.