

Application for voluntary purchase

Employer data

Company name Contract no.

Personal details

Last name First name
 Road / No. ZIP / Place
 Date of birth Social security no.
 Email private Civil status

Questions for the insured person	Yes	No
1. Do you still have a vested benefit with the previous pension fund? If yes, amount in CHF <input type="text"/> per <input type="text"/>	<input type="radio"/>	<input type="radio"/>
2. Have you ever made an advance withdrawal from a WEF (Use of Pension Assets for Encouragement of Home Ownership) and not yet repaid it? If yes, amount in CHF <input type="text"/> per <input type="text"/>	<input type="radio"/>	<input type="radio"/>
3. Do you have one or more vested benefits policies and/or vested benefits accounts? If yes, amount in CHF <input type="text"/> per <input type="text"/>	<input type="radio"/>	<input type="radio"/>
4. Do you have one or more tied pillar 3a pension products where you paid in contributions in the past that exceed the maximum contributions of a salaried employee - the so-called "large deduction"? If yes, amount in CHF <input type="text"/> per <input type="text"/>	<input type="radio"/>	<input type="radio"/>
5. Do you have one or more tied pillar 3a pension products to which you have already paid contributions between the ages of 18 and 24? If yes, amount in CHF <input type="text"/> per <input type="text"/>	<input type="radio"/>	<input type="radio"/>
6. Have you moved from abroad within the last five years? If yes, when did you move in? Per <input type="text"/> . If yes, were you previously insured with a Swiss pension fund? <input type="text"/>	<input type="radio"/>	<input type="radio"/>
7. Do you already receive a retirement pension from a 2nd pillar pension scheme or have you already drawn a retirement capital? If yes, please enclose relevant documentation.	<input type="radio"/>	<input type="radio"/>

By signing this form, you confirm that you have answered all the questions truthfully. If the information provided does not correspond to the actual circumstances, the Avanea Pension Fund declines all liability. The tax deductibility of a purchase is in any case governed by the provisions of the Confederation and the cantons.

Please note that purchases and the resulting benefits may not be paid out in capital form for 3 years.

Comments

Place and date

Signature of the insured person