

# REQUEST FOR ADVANCE PAYMENT OR PLEDGE



Company: ..... Contract no: .....

## Personal data of the insured person

Name and first name: ..... Date of birth: .....  
AVS: ..... Gender:  M  F  
Address: .....  
Phone: ..... E-mail: .....  
Civil status from: .....  single  married  divorced  
 bound by a registered partnership  partnership dissolved  widow(er)  
Name and first name of spouse: ..... Date of birth: .....

## Use of funds

The insured person certifies that the provident funds are destined for his/her own home (principal residence), he must therefore live there and cannot rent it.

- Purchase of a home
- Construction of a home (payment of the funds at the consolidation of the building loan)
- Reimbursement of a mortgage debt
- Conversion of a home
- Acquisition of shares in a building and housing cooperative

## Exact address of the home

Street: .....  
Postcode: ..... Place: .....

## Owner of the home

Insured person  Spouse  .....

Share of ownership: .....

## Amount of the advance payment or pledge

- Total amount available
- CHF ..... (minimum amount CHF 20'000.-)  
On .....

## Payment address for the advance payment or address of the secured creditor or notary

IBAN (max. 34 digits): .....  
Bank / Post (name, postcode, place, country): .....  
Account holder: .....  
SWIFT code (bic): ..... Clearing/BC: .....

## Additional questions in case of advance payment

- Are you currently fully able to work?  Yes  No  
Have you already benefited from advance payments?  Yes  No  
If yes, amount in CHF ..... and date .....  
Have you made personal buybacks within the last three years?  Yes  No  
If yes, please enclose a copy of the tax attestation(s) 21 EDP.

## Enclosures

The following supporting documents must be enclosed with the present request in the case of payment:

- obligatory:**
- attestation from the Notary or the bank
  - recent extract of the land register or draft deed of sale
  - copy of the mortgage agreement
  - for persons not married/not bound by a registered partnership, enclose a certificate of civil status (to be requested from the commune of origin).
  - confirmation of a blocked account
- in function of the case:**
- mortgage agreement and recent statement of the debt (*depreciation of a mortgage debt*)
  - the original shares, statutes of the cooperative (*acquisition of shares*)
  - building and financing plan, and building permit (*construction*)
  - documentation of works, estimates, offers, invoices, plans, etc. (*conversion*)
  - financing plan (*purchase*)

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## General information

### Taxation

For persons domiciled in Switzerland, the Fund notifies the amount of the advance payment or of the realisation of the pledge to the Federal Tax Administration. In this case, the insured person must pay the one-off and distinct tax on the benefits in capital of the occupational insurance by means of his own funds; the advance payment or realisation of the pledge can in no case be used to pay the taxes.

For persons not domiciled in Switzerland, the Fund must proceed with withholding tax.

### Inscription in the land register (only in the case of an advance payment)

The provident institution must require the land register to include a mention of the right to sell. The costs inherent in this inscription are borne by the insured person. For persons domiciled in Switzerland, the Fund itself require the land register to include this wording. This indication, the modalities of which are set out in art. 30 e of the LPP, is also valid when inscription in the land register is not possible (cross-border workers).

### Reimbursement of the advance payment

The insured person has the possibility of reimbursing the advance payment or realisation of the pledge through payments amounting to a minimum of Fr. 10'000.-.

Furthermore, he has the obligation of reimbursing the Fund in the event of the sale of the home or when the conditions of use of the latter are no longer met. In this case, the insured person, who is responsible for informing the Fund of the new situation, is entitled to request reimbursement of the tax paid at the time.

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**I declare that all the information provided above corresponds to the truth.**

Place and date: .....

.....  
Signature of the insured person

Place and date: .....

.....  
Signature of the notified spouse/registered partner or live-in companion

### Authentication of the signature of the notified spouse/registered partner/live-in companion

The signature of the notified spouse/registered partner/live-in companion must be authenticated either by an official body (Justice of the Peace, passport service, local police) or by a notary.

.....  
Seal and signature of the official body