

## Application for a Withdrawal to Finance Home Ownership

<b>Retirement savings account</b>	Account number	
<b>Payment instructions</b>	Amount to be transferred	
	<input type="checkbox"/> Maximum authorised withdrawal	<input type="checkbox"/> Other amount:
	Currency	Desired payment date
	<input type="checkbox"/> CHF <input type="checkbox"/> EURO <input type="checkbox"/> USD <input type="checkbox"/> other:	
<b>Client</b>	Name	First name
	Street, N°	Postal code, place
	Country	Full working capacity
		<input type="checkbox"/> yes <input type="checkbox"/> no
	Phone	Civil status
		E-mail
<b>Payment instructions</b>	Recipient (has to be the seller, creditor or mortgage lender)	
	Post office account	
	Bank	
	Clearing number/SWIFT	Account number/IBAN
	Account holder	Type of account (e.g. blocked account, building account)
<b>Purpose</b>	I will use the withdrawal to	
	<input type="checkbox"/> acquire a residential property for my own use	<input type="checkbox"/> repay a mortgage loan
	<input type="checkbox"/> build a residential property for my own use	<input type="checkbox"/> acquire co-ownership of a residential property
	<input type="checkbox"/> finance renovations or conversions increasing asset value	(e.g. in a cooperative residential association)
<b>Prior withdrawals</b>	I have already used funds from my pension assets for	
	<input type="checkbox"/> a withdrawal	
	<input type="checkbox"/> a pledge	
	Date	Amount in CHF
	Pledgee	
<b>Property</b>	The residential property is <input type="checkbox"/> a one-family house <input type="checkbox"/> an apartment	
	located (or to be located) at my place of residence or my usual place of abode; I live (or will live) at the property.	
	Address:	
	Street, N°	Postal code, place
	Country	
<b>Owner</b>	I am (or will be)	
	<input type="checkbox"/> Sole owner	<input type="checkbox"/> Co-owner (% co-ownership: _____)
	<input type="checkbox"/> Joint owner with my spouse	<input type="checkbox"/> Owner of an independent and long-standing right to build a residence on leasehold property
	<input type="checkbox"/> Holder of an interest in a condominium property (e.g. owner of a partial interest in a cooperative residential association)	
<b>Costs/mortgage</b>	Purchase price or construction price (for new acquisitions)	Mortgages/loans on the residential property
	CHF	CHF

Attachments	Purchase of residential property for own use	Authenticated sales contract Confirmation of use Land register extract (no older than 1 year)*
	Construction of residential property for own use	Building loan agreement Contract for work and labour Building permit Authenticated purchase agreement covering the land Confirmation of use
	Mortgage repayments	Current statement of mortgage loan account Land register extract (no older than 1 year)* Confirmation of use Residence certificate
	Co-ownership	Share certificate (original) with regulations Confirmation of use Lease agreement
	Renovations	Land register extract (no older than 1 year)* Residence certificate Confirmation of order or contractors' invoices Confirmation of use
	Pledges	Copy of pledge agreement Confirmation of use
	For properties in an EU/EFTA member state or for buyers who are not Swiss nationals	Authenticated documents, copy of passport/ID and copy of residence permit
	*For properties in France	Extract from the «Bureau de conservation des hypothèques» (no older than 1 year)

**For single persons**, a certificate of civil status must be produced.

**For married persons**, the authenticated signature of the spouse or registered partner (Federal Law on Registered Civil Partnerships) is mandatory.

**For divorced person or persons whose registered partnership has been dissolved by a court decision**, a copy of the divorce decree or the decision dissolving the partnership must be produced.

**For surviving spouses**, a copy of the updated family record book must be produced.

**Reference** For further information about the encouragement of home ownership, see the relevant Fact Sheet.

**Declaration** I authorise the Foundation to charge the relevant lump-sum fees to my account in accordance with the Fee Schedule.

**Signature** Place, date

Client's signature

Place, date

Partner's signature

**Authentication of spouse's or registered partner's signature**

Authentication in Switzerland: Partner banks (with stamp, name and binding signatures), municipality, notary or attorney-at-law  
Authentication abroad: Partner banks (with stamp, name and binding signatures), notary, attorney-at-law or consulate