

Form for active insured persons

Application for early withdrawal/pledging for home ownership

Send to: Pension Fund of the Siemens Companies in Switzerland,
Freilagerstrasse 40, 8047 Zurich

Insured person

Last name: _____		First name: _____
Street name, no.: _____		
Postcode: _____	City: _____	Country: _____
Date of birth: _____		Insurance no.: _____
Marital status:		
<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Widowed <input type="checkbox"/> Divorced <input type="checkbox"/> Registered partnership <input type="checkbox"/> Dissolved partnership		
Employer: _____		
Tel. no.: _____		E-mail address: _____

Amount of desired early withdrawal/pledge

<input type="checkbox"/> Early withdrawal in the amount of CHF:	_____
<input type="checkbox"/> Pledge in the amount of CHF:	_____
Requested date of payment*:	_____

* Payment is made on the last working day of a month; please submit documents at least two months in advance.

Purpose*

I wish to use my pension fund assets to:

- ☐ Purchase residential property
- ☐ Construct residential property
- ☐ Repay a mortgage loan
- ☐ Purchase unit certificates in a housing cooperative
- ☐ Purchase building land (must be built on within a year)

* No building loans will be granted.

Location of the residential property

Street name, no.:

Postcode:

City:

Country:

Type of property:

☐ Owner-occupied apartment

☐ Single-family dwelling

Ownership status:

☐ Sole ownership

☐ Co-owned property

☐ Jointly owned with spouse/registered partner

Moving-in date:

Date of transfer of ownership:

Declaration by the insured person

By signing below, I confirm that I have completed this application form truthfully and completely, and that I have noted the provisions set forth in the information sheet (see our website www.pk-siemens.ch → Infocenter/Information sheets). I shall reside in the property myself.

Last name:

First name:

Place/date

Signature of insured person

Consent of the spouse or registered partner:

I consent to the payout/early withdrawal or pledging of the vested benefits.

Last name:

First name:

Place/date

Signature of spouse/registered partner

Official certification of this signature:

Certifications in Switzerland: municipal or city council office, notary

Place/date

Official stamp/signature

Bank account number

Name of bank:

Postcode:

City:

Country*:

IBAN:

SWIFT code*:

Account holder (first name, last name):

* for international payments

Required documents/confirmations

- Copy of the notarised purchase agreement
- Copy of the mortgage agreement
- Copy of up-to-date extract from the land register
- Current certificate of civil status of the insured person (obtainable from the registry office; the certificate must be no more than three months old on the date of the payout)
- Official certification of the spouse's/registered partner's signature (on the second page of this document; the certification must be no more than three months old on the date of the payout)
- Construction contract, building permit

When the transfer is in favour of the applicant:

- Confirmation from the bank that the early withdrawal is blocked so that it can be used only for the purchase of property or to reduce the mortgage loan. The assets will be returned if the purchase does not go through.

When purchasing shares in a housing cooperative:

- Regulations/articles of association
- Tenancy agreement
- Confirmation from housing cooperative that share certificate will be delivered to the Pension Fund