

Form for active insured persons

# Voluntary purchases of pension benefits

**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: _____

## Questions to be answered by the insured member

### a) Vested benefits from previous employment relationships in Switzerland

Do you have assets in vested benefits accounts or policies (excluding Pillar 3a)?  Yes  No

**If yes:**

Total amount in CHF: \_\_\_\_\_ as of (date): \_\_\_\_\_

→ Please enclose up-to-date vested benefits statements.

### b) Pillar 3a assets

Do you have 3a assets?  Yes  No

**If yes:**

Do your assets exceed the maximum amount specified in the Federal Social Insurance Office table (see our website [www.pk-siemens.ch](http://www.pk-siemens.ch) → Infocenter/Merkblätter und Formulare\*)?  Yes  No

→ If yes: Please enclose up-to-date 3a statements.

\* In German only: «Tabelle BSV zur Berechnung des grösstmöglichen 3a-Guthabens»

### c) Early withdrawal for home ownership prior to joining the Siemens Pension Fund

Have you made early withdrawals from former pension funds and not yet paid back the full amount?  Yes  No

**If yes:**

Outstanding amount in CHF: \_\_\_\_\_ as of (date): \_\_\_\_\_

→ Please enclose copies of the statements.

### d) Divorce prior to joining the Siemens Pension Fund

Have part of your vested benefits been paid out to your former spouse and not yet (fully) repurchased by you?  Yes  No

**If yes:**

Outstanding amount in CHF: \_\_\_\_\_ as of (date): \_\_\_\_\_

→ Please enclose a copy of the statement.

### e) Move to Switzerland from abroad

Have you moved to Switzerland within the last five years?  Yes  No

**If yes:**

Date of move to Switzerland: \_\_\_\_\_

Have you previously been insured by a pension institution in Switzerland?  Yes  No

→ Please attach copies of the insurance certificates and/or final benefits statements.

### f) Early retirement

Do you already draw/have you already drawn retirement benefits (pension or lump sum) from occupational pension insurance as a result of early retirement?  Yes  No

→ Please enclose copies of the pension notification or lump-sum payment notification.

### g) Origin of the financial resources\*

What is the origin of the financial resources to be used for the planned voluntary purchase of additional benefits in the Pension Fund?  Private funds  
 Transfer of vested benefits  
 Transfer of Pillar 3a assets

\* This information is needed for the confirmation of pension fund contributions sent to the tax authority.

**Confirmation**

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I confirm that I have completed this form truthfully. I have taken note of the contents of the “Voluntary purchases of pension benefits” information sheet, particularly the restriction pursuant to Article 37, paragraph 5 of the Pension Fund Regulations and the information relating to taxes. Omissions or inaccuracies may have tax consequences for which I bear sole responsibility.

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Place/date

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Signature of insured person