

Pledge of Pension Benefits (WEF)

Company

Name	First name
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Street/no.

ZIP code/town

Date of birth	SI number	756.
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E-mail	Phone no.
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Marital status	single	married	divorced
	registered partnership	dissolved partnership	widowed

Notes

A pledge is subject to the same laws and regulations as an advance withdrawal (Article 30c BVG/LOB and Article 331d OR):

- Insured persons may pledge their entire available savings until they reach the age of 50. From the age of 50 onwards, they may pledge half the current savings or the savings at age 50, whichever is greater.
- A pledge is possible until 1 month before reaching the retirement age.
- For a pledge to be made, written consent is required from the spouse or registered partner or from the partner who is a beneficiary. Their signature must be officially certified on the application form.

Details about the pledge

Total of vested benefits	or	amount in CHF
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Details about the property

Type of property	single-family home	condominium
Form of ownership	sole ownership	co-ownership: ____%
	joint ownership between spouses/ registered partners	

Address of property

Confirmation of insured person

- I confirm that the residential property is for my own use and that I have completed this application truthfully.
- We will invoice you for the costs of CHF 250.00 after receiving and reviewing the application for advance withdrawal to finance Residential Property (WEF).

Signatures

Persons who are **married or living in a registered partnership** need to provide an officially certified signature of their partner and an official family certificate.

We require current proof of marital/civil status from **unmarried persons**. If there is a beneficiary listed, we also need his or her officially certified signature.

This document is a translation. In the event of a dispute, the German version shall prevail.

Date

Signature of the insured person

Date

Officially certified signature of spouse/
registered partner/beneficiary

Required documents

- Notification of pledge
- Announcement of pledge from bank
- Confirmation of residence (not older than 30 days)
- Excerpt from the Land Register (not older than 30 days)