

Application to pledge pension benefits (WEF)

1. Insured person

Company

Surname

First name

Street, no.

Postcode/City/Country

Date of birth

AHV/AVS number

Tel. no.

E-mail

Civil status

single

married

divorced

registered partnership

dissolved partnership

widowed

2. Notes

A pledge is generally subject to the same legal provisions as an early withdrawal to purchase property (Art. 30c OPA and Art. 331d CO):

- Under the age of 50, the maximum pledge amount is the current value of the insured person's retirement assets. Over the age of 50, only the assets held at the age of 50, or half of the current assets (if higher) can be pledged.
- A pledge can be made one month prior to retirement at the latest.
- This pledge can only be made with the written consent of the insured person's spouse or registered partner. The signature must be officially verified.

3. Information regarding the pledge

all retirement assets

or

amount in CHF
(at least CHF 20,000)

Type of property

Single-family home

Condominium

Type of ownership

Sole ownership

Co-ownership.....%

Joint ownership with
spouse/registered partner

Property address

Surname

First name

AHV/AVS number

4. Confirmation and signature(s)

I confirm that:

- the pledge will be used for an owner-occupied property and that this application has been completed truthfully.
- the owner-occupied property is my primary residence.
- my pension benefits have not already been pledged.
- i will transfer the costs of CHF 250.00 in advance.
 - 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).

For people who are **married or in a registered partnership**, an officially verified or notarially certified signature from their spouse or registered partner is required, as well as a family booklet.

For **unmarried persons**, we require a current civil status certificate.

Place, date

Insured person's signature

Place and date

An officially verified or notarially certified signature from your spouse or registered partner*

* **The notarial certification or official verification must be made on this form and may be no more than three months old!**

5. Required documents

The documents may be **no more than three months** old.

- Pledge notification from the bank
- Current pledge agreement
- Current certificate of residence (no more than 30 days old)
- Current land register extract with indication of ownership type
- If you are married or in a registered partnership: family booklet
- If you are unmarried: civil status certificate
- Payment confirmation for the transfer of CHF 250.00