

Account number

## Advance withdrawal for owner-occupied residential property

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### Personal data of the Contracting Party

Surname

First name

Street, number

Post code

City or town

Date of birth

Civil status

Citizenship

Telephone number

Social security number

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### Reference

 Entire credit balance (in CHF) and balancing of the account Partial withdrawal of the credit balance (in CHF)

Note: An early withdrawal is possible only every 5 years and the latest 5 years before reaching the regular OASI age. The amount available for early withdrawal is equal to the vested benefits credit balance. If the Contracting Party has already reached the age of 50, only half or the capital shown at age 50, whichever is larger, can be claimed.

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### Due date

 Disbursement on the next possible date Disbursement date (max. 3 months in the future)

Note: The processing time can be up to 25 working days as of receipt of the letter. The Foundation carries out a portfolio valuation twice a month, in the middle and at the end of each month. The closing value of the Contracting Party's account is based on the value that is determined after the Foundation has received the legally valid notice of termination including the documents required by the Foundation. The desired payout date will be taken into consideration to the greatest degree possible, but cannot be guaranteed.

## Information about the property

Address of the property

Land register sheet number

Municipality (postcode, city or town)

Ownership

Sole ownership

Building law

Co-ownership / share in percent

Total ownership

(only possible with spouse / registered partner)

## Documents to be submitted

### Mandatory documents

- Copy of an official ID with signature of the Contracting Party
- Copy of an official ID with signature of the spouse / registered partner
- If the Contracting Party is not married: Confirmation of current civil status (civil status certificate not older than 3 months)
- In the event of a divorce: Divorce decree

### Additional as of the age of 50

- Current pension scheme statement / confirmation of vested benefits at age 50

Note: If these documents are not enclosed, we can only disburse half of your vested benefits credit to you while the rest will remain on your vested benefits account.

## Documents according to intended use

- Acquisition
  - Publicly notarised purchase contract / draft purchase contract incl. confirmation by the notary when the contract will be signed
  - Confirmation of use of funds by the mortgagee / notary public
  - Copy of a valid mortgage loan agreement / confirmation of mortgagee
- Construction of a new property
  - Land register excerpt (not older than 3 months) / publicly notarised purchase contract for the building plot
  - Building loan agreement
  - Copy of a valid mortgage contract / confirmation of mortgagee
  - Contract for work and services / architect's contract / general contractor's contract
  - Building permit
  - Confirmation of use of funds by the mortgagee / notary public
- Amortisation of mortgage
  - Land register excerpt (not older than 3 months)
  - Copy of current certificate of residence (not older than 3 months)
  - Copy of a valid mortgage contract / confirmation of mortgagee
  - Confirmation of use of funds by the mortgagee / notary public
- Renovation
  - Land register excerpt (not older than 3 months)
  - Copy of current certificate of residence (not older than 3 months)
  - Copy of a valid mortgage contract / confirmation of mortgagee
  - List of investments and detailed signed order confirmations / invoices (no offers / cash receipts / not older than 1 year)
  - Confirmation of use of funds by the mortgagee / notary public

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**Payment instructions**

Bank name

Swift / BIC

IBAN / account number

In the name of (surname, first name)

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**Signature and confirmation**

With their signature, the Contracting Party confirms

- that this application and the documents submitted are correct and complete.
- that they have read the leaflet "Advance withdrawal for owner-occupied residential property" and / or "Disbursement of pension capita for renovations of owner-occupied residential property".
- that they have been made aware of the consequences of an early withdrawal.
- that the purpose of use within the meaning of the Ordinance on the Promotion of Home Ownership with Funds from Occupational Pension Plans (WEFV) of 3 October 1994 is complied with and that the funds are used exclusively for the above-mentioned owner-occupied property (main residence).
- that they have been informed
  - that the advance withdrawal is taxable, for which they must pay themselves.
  - that the residential property is subject to a restriction on sale, which is entered in the land register.
  - that they will be required to pay the external fees for the entry in the land register themselves.
  - that the payment is never made directly to the Contracting Party (private account) but to a blocked building loan or mortgage account. The payment is made in one amount to the seller, builder or lender.

Place, date

Signature of the Contracting Party

With their signature, the spouse / registered partner confirms that they consent to the disbursement.

Place, date

Signature of spouse / registered partner

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**Authentication of the signature**

Official authentication of the signature of the spouse / registered partner.

Place, date

Signature of notary / official (stamp)

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**Delivery by mail**Please return the completed form with all relevant documents to:  
Zugerberg Freizügigkeitsstiftung, Lüssiweg 47, CH-6302 Zug