

Declaration concerning the repurchase of LPP/BVG contributions

Employer

Company name: _____ Contract No. : _____

Insured person

Name: _____ Social insurance No. : 756. _____

First name: _____ Date of birth: _____

Address: _____ Nationality: _____

Postcode/Town: _____ Residence permit: _____

Vested benefits

Do you have assets on a vested benefits account with a bank, the Substitute LPP/BVG Pension Plan, or with an insurance company? yes no

If yes:

Name/address of the bank/insurance company: _____

Amount of the vested benefits: _____

Value as at: _____

In accordance with the legal provisions, the vested benefit from the former pension fund and any assets available from 2nd pillar vested benefits institutions must be transferred when joining a new pension fund. Untransferred assets held in vested benefit accounts/policies shall be deducted from the maximum amount that can be repurchased.

Home ownership incentive

Have you made an early withdrawal from a former pension fund and/or vested benefits accounts or policies, which has not yet been repaid? yes no

If yes:

Name/address of the bank/insurance company: _____

Amount drawn: _____

Refund made on: _____

Amount of refund: _____

Repurchasing benefits is only possible after any early withdrawals made as part of the home ownership incentive have been repaid in full, unless a vested benefit has been paid out following divorce.

Divorce

Have you had to pay a vested benefit as a result of a divorce? yes no

If yes:

Total amount paid: _____

Amount already repurchased: _____

Self-employed gainful activity

Have you been self-employed in the past? yes no

If yes:

- There are no accounts or pension policies as part of a tied pension provision (pillar 3a) scheme.
- The following tied pension provision accounts (3a) exist:

Name and address of the institution: _____

Balance/repurchase value: _____

Total value as at: _____

If a self-employed gainful activity has been carried out previously, part of the possible assets available under a 3a tied pension provision scheme must, in certain cases, be taken into account in the repurchase amount.

Arrival from abroad

Did you arrive in Switzerland after 1 January 2006? yes no

Have you previously been insured in Switzerland *? yes no

Initial date of arrival in Switzerland: _____

**Please enclose the insurance certificates and/or the vested benefits statement.*

For persons arriving from abroad who have not yet been affiliated to a pension fund institution in Switzerland, the maximum amount that can be repurchased annually is set, for the first five years, at a maximum of 20% of the insured salary.

Comments

Please note that benefits (including interest) from an optional repurchase cannot be paid out in the form of a capital lump sum during the three years following the repurchase (e.g. early withdrawal for home ownership, capital lump sum payment upon retirement, cash payment in the case of departure).

In accordance with the case law of the Federal Court, we recommend that you contact the competent tax authorities to find out whether the retirement capital already existing at the time of repurchase does not fall within the aforementioned period.

Declaration of the insured person

I have taken note that the repurchase amount is calculated based on my details and the data available to the Pension Fund. The tax deductibility of contributions paid for the repurchase of contribution years is governed by federal and cantonal tax legislation. I have taken note of the fact that any omission or inaccuracy in the above-mentioned information may have tax consequences for which I shall be solely responsible.

Place and date:

Signature of the insured person: