

Request for early withdrawal of funds for home ownership (WEF)

Surname _____ First name _____

Address _____ Postcode, place _____

In the case of an early withdrawal, the retirement savings are reduced. The payment is always carried out at the end of the month and at the earliest two months after submission of the request form with all the required documents.

I request an early withdrawal of CHF _____ Date of payment _____

I need the early withdrawal for
(please tick the box applicable)

Object of early withdrawal

- Purchase of residential property
- Building of residential property
- Repayment of mortgage payment
- Conversion that increases or preserves value
- Participatory shares in a residential cooperative

Forms of home ownership

- Sole ownership
- Co-ownership
- Joint ownership

Documents to be submitted

- Publicly certified and signed purchase or sales contract in the case of existing real estate and copy of building permission in the case of land purchase and building project
- Mortgage agreement
- Bank payment details, name of bank, account number and IBAN, SWIFT code (for transfers abroad)
- Bank confirmation on the use of the funds
- Extract from land register (Switzerland and abroad) or certification showing possession of land (abroad)
- Confirmation of civil status if **not** married

Place, date _____

Signature of insured person _____

Signature of spouse _____

In the case of married insured members, the written consent of the spouse is required by authenticated signature
(signature of spouse on this form officially certified by a notary or municipal authority)



Pledging of funds

Surname _____ First name _____

Address _____

Postcode, place _____

I intend to pledge my retirement savings as follows:

(please tick applicable box)

- Pledging of portable sum available at the time of pledging
- Pledging a sum to the value of CHF _____
- Pledging of portable sum at the time of the realization of pledged funds

(Please refer to the leaflet for explanation on maximum amount possible.)

Name and address of creditor (e.g. bank)

Documents to be submitted

- Copy of pledge agreement from bank
- Confirmation of civil status if **not** married

Place, date _____

Signature of insured person _____

Signature of spouse _____

In the case of married insured members, the written consent of the spouse is required by authenticated signature

(signature of spouse on this form officially certified by a notary or municipal authority)

