

Application for early withdrawal for home ownership



Please complete this form in full, sign it and submit it together with the required documents.

1. Details of the insured person

IBAN of pension account		Date of birth	
First name(s)		Street / No.	
Surname		Postcode / Town	
AHV number		Email	
Civil status		Telephone no.	
Country		Gender	☐ m ☐ f

2. Payment details

Payment will only be made to a designated and restricted account held in the name of the pension account holder.

Amount	☐ Maximum payment amount	☐ Other amount: CHF	
Payee (seller, creditor, mortgage lender)			
IBAN			
Bank / Institution			
Account holder			

3. Purpose of payment

I will use the pension savings for

- | | |
|---|---|
| ☐ the purchase of a residential property | ☐ repayment of mortgage loans |
| ☐ the construction of residential property | ☐ share in residential property (e.g. housing cooperative) |
| ☐ value-enhancing renovation or conversion | |

4. Previous Use

- ☐ I confirm that I have not made any early withdrawals for home ownership (WEF) in the last 5 years.

5. Property

The residential property is ☐ a detached house ☐ a flat and is (or will be) located at my legal domicile or habitual place of residence and is (or will be) occupied by me.

Street, No.		Postcode, Town	
Country			

6. Ownership

I am (or will be)

- ☐ sole owner
- ☐ Joint owner with my spouse
- ☐ Holder of an ownership interest in residential property
(e.g. holder of shares in a housing cooperative)
- ☐ Co-owner (share in %:)
- ☐ Holders of an independent and permanent building right

7. Required Documents

Upon acquisition of residential property ¹	- A notarised purchase agreement or a draft thereof - Confirmation of the intended use (form) - Land registry extract (not older than 1 year) - Current certificate of residence, not older than 3 months
Upon the construction of residential property ¹	- Notarised purchase agreement for the plot of land or a draft thereof - Confirmation of intended use (form) - Current certificate of residence, not older than 3 months
For repayment ¹	- Land registry extract (not older than 1 year) - Confirmation of the intended use (form) - Current certificate of residence, not older than 3 months
For renovations ¹	- Land registry extract (not older than 1 year) - Quotations from tradespeople (no invoices) - Confirmation of the intended use (form) - Current certificate of residence, not older than 3 months
In the case of shareholding ¹	- Share certificate (original) with articles of association - Confirmation of the intended use (form) - Current certificate of residence, not older than 3 months

¹ Proof of civil status:

- Unmarried or widowed persons must submit a current certificate of civil status, issued within the last 3 months
- Married persons or persons in a registered partnership must provide an officially certified signature of their spouse or registered partner.
- Divorced persons or persons whose registered partnership has been dissolved by court order must submit a copy of the divorce judgment or the court order dissolving the registered partnership, together with a current certificate of civil status issued within the last 3 months.

8. Notes

Further information on home ownership support can be found in our relevant information sheet. Please note that fees apply. The fees are clearly set out in the currently valid regulations on fees and charges on the Foundation's website.

9. Declaration

I confirm that the above information and the documents submitted are correct and complete. I authorise HBL 3a Pension Foundation (the "Foundation") to carry out any further investigations deemed necessary. I acknowledge that the 30-day payment period begins once all required documents have been received by the Foundation. By submitting this application, I also instruct the Foundation to sell my investment portfolio. The proceeds from the sale shall be credited to my pension account until payment is made. If the payment cannot be approved or if I subsequently withdraw this application, the proceeds from the sale shall remain in my pension account unless I provide different written instructions. Any instruction to reinvest the proceeds or to withdraw this application must be submitted in writing. Other forms of instruction shall not be binding on the Foundation.

I understand that the pension account will be closed once a full withdrawal has been made.

10. Declaration and signature of the pension account holder

I confirm that the information I have provided is complete and accurate. I am aware of the tax implications of the payment.

Place / Date _____

Signature _____

Official certification of the above signature:

Certifications in Switzerland: Municipality, notary (with stamp, name and legally valid signature)

11. Signature of spouse or registered partner

Signature _____

Official certification of the above signature:

Certifications in Switzerland: Municipality, notary (with stamp, name and legally valid signature)

Please send us the payment application together with all the required supporting documents to the following address:

HBL 3a Vorsorgestiftung
Postfach
5600 Lenzburg