

## Application for payment – mortgage repayment (home ownership facilitation)

**Note:**

Pension assets may only be withdrawn to facilitate home ownership every five years.

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### Client

Client number	Plan number
First name	Surname
Marital status	Street, number
Postcode	Town
Date of birth	Social security number
Telephone number	E-mail

### Information about the property

Street, number	Postcode, town
Country	Land register folio no.

### Payment instruction

Withdrawal of the entire pension assets and closure of the pension relationship

I would like to make further payments to the Independent Pension Foundation 3a in the future:

Yes (An adviser should contact me regarding a reopening.)

No

Partial withdrawal/amount requested in CHF

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## Confirmation

### I herewith confirm that...

the funds will be used solely for the above-mentioned property, which I occupy myself (principal residence).

I have the following ownership rights to the property:

**sole ownership or co-ownership or joint ownership with the spouse/registered partner**

the pension assets are not pledged and I have not withdrawn any pension funds to finance residential property in the last five years.

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## Documents to be submitted

- Copy of the Client's passport/ID (bearing a legible signature)
- Copy of the extract from the land register (issued within the last 3 months)
- Copy of the loan agreement
- Current mortgage account statement
- *If not married or living in a registered partnership:*  
Certificate of civil status/official confirmation of civil status (issued less than 1 month ago)  
or
- *People who are married or living in a registered partnership:*  
Copy of the spouse/registered partner's passport/ID (bearing a legible signature)

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## Confirmation from the mortgagee and transfer instruction

Payment can only be made to a mortgage account

Notary

Bank/Post/Insurance

Name of mortgagee

Address of mortgagee

Amount in CHF

Account holder/beneficiary

IBAN

Name of bank

Reference

The mortgagee confirms with his/her signature that he/she accepts the advance withdrawal for repayment of the mortgage and will ensure that these funds are used solely for the purpose of the legal provisions governing home ownership facilitation. If the payment cannot be used to repay the mortgage, the mortgagee agrees to refund the entire amount to the Independent Pension Foundation 3a Zurich.

Place	Date	Signature of the mortgagee
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I confirm that the information above is accurate and complete, as are the documents I have submitted. If the entire capital is being withdrawn, the pension account/securities account will be closed once the funds have been transferred. I permit the Independent Pension Foundation 3a Zurich to seek further clarification if necessary. At the same time, I issue the order to sell any securities investments in the amounts needed up to the payment date.

I authorise the mortgagee to accept the funds withdrawn from the Independent Pension Foundation 3a Zurich on my behalf. I acknowledge that the Independent Pension Foundation 3a Zurich must report the lump-sum withdrawal to the Federal Tax Administration (FTA). As a capital payment from the occupational pension, the lump-sum withdrawal is taxable separately from other income (federal government, canton, local authority). Withholding tax will be deducted directly for persons residing outside Switzerland.

Place	Date	Signature of the Client
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Place	Date	Signature of spouse/registered partner
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Please send the form to:

Sending address:

Sending address:

Use this cover sheet to forward the documents in a window envelope.