

Application for retroactive purchase into the Pillar 3a (Art. 7b BVV3)

Beneficiary

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

Details of the requested purchase

1. Have you already paid in the maximum amount for the current year? Yes No
- If not, a retroactive purchase is not possible in the current year. The maximum amount for the current year must be paid in first.

	Year	Planned purchase
2. For which year would you like to make the retroactive purchase and how much would you like to pay in?		

Whether the requested retroactive purchases can then be made depends on you answers to question 3 and 4.

	Year	Amount paid	Contribution gap
3. Please indicate whether, and to what extent, you have made regular payments (in accordance with Art. 7 para. 1 BVV3) into Pillar 3a and specify each gap, indicating the year to which it applies.			

Retroactive purchases can only be made for years with a contribution gap.

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|---|-----|----|
| 4. Have you earned any income that is subject to AHV/AVS contributions in the year for which you wish to make the retroactive purchase? | Yes | No |
| 5. Did you receive a salary liable to OASI contributions in the year for which the retroactive purchase is to be made? | Yes | No |

It is not possible to make a retroactive purchase for years with a contribution gap during which no income liable to OASI contributions was earned.

Similarly, a retroactive purchase can no longer be made if the contribution gap has already been closed and is no longer outstanding.

Statement by the applicant

I hereby confirm,

- that the information provided above is correct;
- that the requested retroactive purchase for the specified contribution years has not been settled by a previous payment;
- that I have not taken any retirement benefits from Pillar 3a in accordance with Art. 3 para 1 BVV 3;
- that I have taken note of the fact that the requested retroactive purchase may only be made if approved in advance by the Independent Pension Foundation 3a Zurich;
- that the payment may only be made in the amount of the retroactive purchase approved by the Independent Pension Foundation 3a Zurich (if made in a different amount, the entire payment will be rejected);
- that the retroactive purchase must be made by 15 December of the calendar year at the latest and by this date the maximum amount for the current year must have already been paid.

Place	Date	Signature of the Client

Please send the form to:

Sending address:

Sending address:

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