

Application for Advance Payment / Pledge Through the Occupational Pension Provision

Insured Person

OASI No :
 Surname : Forename :
 Address :
 Postcode / City :
 E-mail :
 Work phone : Home phone :
 Date of birth :
 Marital status :

if divorced : « I certify that no claim to my 2nd pillar is pending following my divorce. My vested benefit is therefore 100% free. »

Previous advance payments

Have you previously made an application for an advance payment ?
 yes no If yes, when and where ?

Voluntary purchase

Have you previously made a voluntary purchase during the last 3 years ?
 yes no if yes, when ?

Information about your fitness for work

Are you fully fit for work ? yes no
 Is your employment contract terminated ? yes no

Spouse or registered Partner

Surname : Forename :
 Date of birth:

Purpose of the withdrawal

I wish to use the funds to :
 buy my own home
 build my own home
 repay mortgages
 convert my own house (except usual maintenance works)
 acquire shares of a homeowners association

Owner

I am/ will be the :
 sole owner
 joint owner
 joint owner with my spouse/registered Partner
 In this case, is an application also being made for your spouse/registered partner with her/his pension fund
 no yes Amount requested :

Amount requested CHF Date of payment

We recommend that you schedule the application sufficiently in advance so that your payment date can be met.

Location of the property Address :
Postcode / City
Canton : Plot No :

Applicable land register (if property in CH) Name / Address :
Postcode / City :

Mortgage/loan Name of the creditor :
Address : Postcode / City :
Amount in CHF :

Payment information

Mortgagee Notary Seller

Name of the bank :
Address :
Postcode / City :
IBAN No :
Name of the account holder :

The undersigned confirms that she/he has been informed about the consequences of an advance payment and of making a pledge respectively, and also about the obligation to reimburse the amount collected if the property is sold or if equivalent economic rights are granted on the property

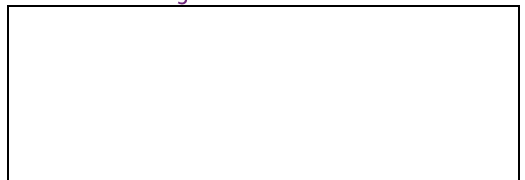
The undersigned confirms she/he has completed this form truthfully.

Place and date :

Signature of the insured person :

Authenticated signature of the spouse or of Registered partner (LPart)* :

Reserved for legalization



The certified signature of spouse or registered partner (LPart) is essential for capital payments. You may take an appointment with our office for signature certification (bringing your identity documents and family record book or family certificate) or return the application to us with the spouse's or registered partner's signature (LPart) certified by a civil registrar or a notary.

Documents to be provided

It is essential to attach all documents to your application.

The list of documents is not exhaustive and the Foundation reserves the right to ask you for any other document it deems necessary.

We make you aware that the assets of the 2nd pillar cannot be used for financing :

- Normal maintenance of a dwelling,
- Mortgage interest,
- Taxes due on the advance payment,
- Notary fees
- Land register fees
- For a purchase of land without construction .

Purchase

1. This form, completed, dated and signed
2. Copy of the identity card or passport of the insured and the spouse or registered partner (LPart)
3. Copy of the signed notarial deed or sale agreement or draft
4. Copy of the mortgage contract with financial plan
5. Certification of the notary which mentions :
 - Address and price of the property
 - Marital status
 - The type of residential property (individual ownership, co-ownership mentioning share of ownership, or joint ownership);
 - The amount paid will be used exclusively to finance the main residence in accordance with the Swiss law in force, otherwise it will be returned to Patrimonia Foundation
 - Commitment to provide us a copy of the final deed of sale
 - Bank informations including the IBAN number
 - For purchase in Switzerland, commitment to proceed of the registration of sales restrictions according to the LPP with the land register.

Construction résidence principale

1. Advance withdrawal request form, completed, dated and signed
2. Copy of the identity document or passport of the insured and the spouse or registered partner (LPart)
3. Copy of the construction and/or contracting contract
4. Copy of the firm and definitive building permit
5. Copy of the mortgage contract with financing plan
6. Civil status certificate or birth certificate (less than 3 months old)
7. Certificate of the creditor mentioning:
 - Loan amount
 - That the amount paid by Patrimonia Foundation will be used exclusively for construction of the main residence
 - Commitment to return the funds if the real estate project does not proceed

Patrimonia Foundation

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Work providing added value (excluding usual maintenance or external fitting out work)

1. Advance withdrawal request form, completed, dated and signed
2. Copy of identity document or passport of insured and spouse or registered partner (LPart)
3. Copy of the notarial deed of sale
4. Copy of detailed quotations
5. Copy of the firm and definitive building permit
6. Certificate from the bank mentioning :
 - That the amount paid by the Patrimonia Foundation will only be used for work carried out in the property according to the announced estimate
 - Commitment to return the funds if the work does not take place
 - Bank details to make the payment

Mortgage amortization

1. Advance withdrawal request form, completed, dated and signed
2. Copy of the identity document or passport of the insured and the spouse or registered partner (LPart)
3. Copy of the notarial deed of sale
4. Certificate of residence less than one month old
5. Civil status certificate or birth certificate (less than 3 months old)
6. Certificate from the bank mentioning:
 - Amount of capital remaining due and the date of calculation
 - Name and address of the loan recipient
 - That the funds paid by the Patrimonia Foundation will be used exclusively for amortization of the loan concerning his main residence
 - Commitment to return the funds if repayment does not take place
 - Bank details to make the payment

Acquisition of shares in the company

1. Advance withdrawal request form dated and signed
2. Copy of identity document or passport of insured and spouse or registered partner LPart
3. Copy of by-law or statutes of the cooperative
4. Copy of construction and housing cooperative confirmation
5. Original of shares
6. Civil status certificate or birth certificate (less than 3 months old)