

Purchase of Pension Benefits

First name _____ Surname _____

Street/No. _____ Postcode/town _____

PID _____

Any assets you may hold in other vested benefits institutions are to be counted towards voluntary purchases of additional benefits. For formerly self-employed persons, pillar 3a pension assets must also be taken into account up to a certain limit (Art. 60a BVV 2/OPP 2). In addition, restrictions apply to the purchase of additional retirement benefits by persons moving to Switzerland after January 1, 2006 (Art. 60b BVV/OPP 2/).

Please answer the questions listed below:

1. Do you own assets in vested benefits accounts or policies as part of your occupational benefits provision?

No

Yes, I own the following assets:

Balance/surrender value as of December 31, ...	Name/address of bank/insurance company:

2. Have you ever been self-employed?

No

If yes:

I do **not** hold pillar 3a pension accounts or policies.

I hold the following pillar 3a pension accounts or policies (please enclose statements/tax certificate):

Balance/surrender value as of December 31, ...	Name/address of bank/insurance company:

3. Have you moved to Switzerland in the last five years?

No

If yes:

I was previously a member of a Swiss pension fund (please enclose insurance certificate).

I was not previously a member of a Swiss pension fund.

Place/date

Signature of the insured
