

Application for the Pledge of Retirement Savings for the Purpose of Acquiring Residential Property

First name		Last name	
Street, no.		Zip Code, Town	
Date of birth		Portfolio no.	
AHV no.		Marital status	

If marital status is «divorced» / «dissolved registered partnership» / «widowed»

Date of change of marital status

If marital status is «married» / «in a registered partnership»

Date of marriage / registration of partnership

First name, last name of spouse / registered partner

Date of birth of spouse / registered partner

I hereby apply to the findependent 3a Retirement Savings Foundation for the pledge of the above-mentioned tied pension savings 3a.

Name and address of the pledgee

Pledge effective from (date)

Documents to be enclosed

Please enclose the following documents. Copies are entirely sufficient. It is best to keep your originals yourself, as we do not return submitted documents.

- Copy of the pledge agreement
- Confirmation from the bank that the pledge is connected with the acquisition of residential property as a main residence that the pension holder will use themselves
- Purchase agreement or current land register extract

Confirmation and signatures

I hereby confirm that the pledged savings serve as security for :

- ☐ Acquisition or construction of residential property (primary residence)
- ☐ Deferral of the repayment of the mortgage loan for residential property (primary residence)

I acknowledge that any realisation of the pledge will reduce the retirement savings and is immediately subject to tax.

I confirm the accuracy and completeness of the above information and of the submitted documents. I confirm that I have read and understood the notes provided on the form.

I authorise the findependent 3a Retirement Savings Foundation ("Foundation"), if necessary, to make further enquiries on its part, including with courts, authorities and pension institutions. The Foundation accepts no liability for the consequences of late or unexecuted payments, in particular in the case of payment towards the end of the year. The Foundation does not review the tax consequences of the payment; these must be clarified by me as the pension holder. Swiss law applies. The place of jurisdiction and place of performance is Aarau.

Place, date

Signature

Place, date

Certified signature of spouse / registered partner