

Request to transfer a previous early withdrawal made for the encouragement of home ownership

You previously made an early withdrawal for an owner-occupied residential property and now want to transfer the early withdrawal to a new owner-occupied property.

1 Personal details

We need at least one of the following three details in order to identify you:

Name of employer

Contract number

AHV number

Note

Your **contract number** can be found on your pension plan or on your pension certificate.

We need all the following information:

Last name

First name

Date of birth

Home town

Gender
 male
 female

Street, no.

Zip code, town or city, country

Home phone number

Email

Marital status
 single married divorced widowed registered partnership
 dissolved partnership

2 Spouse or registered partner

Last name _____

First name _____

Date of birth _____

Home town _____

3 Previous early withdrawal

Amount withdrawn in CHF	Disbursed on (date)
_____	_____

By the following pension plan or vested benefits institution:

Name of pension plan or vested benefits institution _____

Contract or account number _____

Reference _____

4 The early withdrawal will be transferred as follows

Purchase of residential property

Construction of residential property

Other use:

Exact address of the property to which you want to transfer the early withdrawal _____

Transfer to a vested benefit institution; the amount will be used again for residential property within two years:

Name and address of the vested benefit institution _____

IBAN of the vested benefit institution _____

Number of the vested benefit account or vested benefit policy (if known) _____

Zurich will send the early withdrawal documents to the vested benefit institution. The vested benefit institution is responsible for repayment and cancellation of the sales restriction.



Transfer to a vested benefit institution

If the sale of the old property does not coincide with the purchase of the new property and the duration between the two events is less than two years, the early withdrawal can be transferred into a vested benefit institution during this time.

5 Confirmation

By signing this document, every one of the undersigned parties confirms that he or she:

- Agrees to the transfer;
- Has read the pension regulations on the encouragement of home ownership with pension fund assets;
- Agrees to the entry of the sales restriction in the land register; the land registry will bill the insured person directly for the entry costs.



Note

Please do not submit the request until you have all the documents required by the «Encouragement of home ownership checklist – Documents required for the transfer of a previous early withdrawal». We do not need any additional documents if you wish to transfer the early withdrawal into a vested benefit institution.

Place, date	Signature
Place, date	Signature of your spouse or registered partner

6 What happens next?

Once we have received and reviewed your documents for the early withdrawal transfer and have received the cost contribution that you are required to pay under the pension regulations, we will initiate the process for canceling the sales restriction entry for the previous property.

Please send all documents and the completed and signed form by regular mail or email to:

Zurich Switzerland
Scanning BVG
P. O. Box
8085 Zurich
bvg@zurich.ch



Do you have any questions about this form?

Help Point BVG (phone 0800 80 80 80) is available to answer your questions from 8 a.m. to 6 p.m. from Monday to Friday.