

Application for Voluntary Contribution (Form E2)

(self-assessment)

Surname _____ Forename _____ Date of birth _____

SS no. _____ Marital status _____ Telephone _____

email (private) _____

Contributions to the pension fund are subject to the statutory terms set out in the relevant laws (Art. 79b BVG and Art. 60a/60b BVV 2) and to the terms set out in the Pension Fund Regulations (Art. 10 Paras. 4–7).

Proposed contribution: CHF _____ Date _____

**Please make sure that your answers to the questions below are full and accurate.
 We will check your application and issue a deposit slip if your contribution is duly approved as requested.**

1. Have you ever been self-employed?

No Yes, my current total credit in **Pillar 3a** amounts to: CHF _____

2. Do you still have any credit in occupational pension schemes with other pension institutions and vested benefits foundations (banks or insurance companies)?

No Yes, my current total credit with pension schemes and vested benefits foundations in **Pillar 2 (BVG)** amounts to: CHF _____
 (Please enclose written verification / bank statements)

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

No Yes, I moved to Switzerland on _____ (date)

If so, were you already in a Swiss pension scheme before moving to Switzerland?

No Yes, (Please enclose insurance certificates and/or termination statements)

4. Have you already made an advance withdrawal for home ownership purposes (WEF)?

No Yes, _____ on _____ (date) CHF _____

I acknowledge that, after a voluntary purchase of additional pension benefits, I cannot draw out the resulting benefits in capital form (monetary compensation instead of an old-age pension, early withdrawal for home ownership or cash payment of the retirement benefit) for a period of three years. If a capital payment or early withdrawal is claimed before the three years expire, it is to be expected that, according to tax law, a deduction is not permissible for the relevant purchase. I will request appropriate clarification from the tax authority myself in advance. The foundation accepts no liability for this.

Place and date _____ Signature _____

Send to:
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