

Please fill out, sign and return this form to us.

Pension fund purchase

Pensionskasse der Lonza
Münchensteinerstrasse 38
CH-4052 Basel

+41 (0)61 316 27 89
pensionskasse@lonza.com
www.pensionskasse-lonza.ch

General information on the insured person

Last name, first name:
Insured person no.: 756.....
Born on:
Resident in:

1. Declaration

a) Vested benefit entitlements from previous employment relationships in Switzerland

I have other vested benefits accounts or policies (excluding pillar 3a).

☐ Yes ☐ No

Value CHF As at 31.12.

(Please give total amount of all vested benefit entitlements)

b) Pillar 3a savings

I have pillar 3a savings which I have set aside from previous self-employment instead of BVG retirement savings.

☐ Yes ☐ No

Value CHF As at 31.12.

(Please give total amount of all pillar 3a savings)

c) Prepayments for home ownership before joining the current employee benefits institution

I drew prepayments for home ownership before joining the current employee benefits institution and these prepayments have not yet been repaid (in full).

☐ Yes ☐ No

d) Payment as a result of divorce / legal dissolution of a registered partnership before joining the current employee benefits institution

Portions of my vested benefit entitlements were paid out to my divorced / ex-registered partner before joining the current employee benefits institution and have not yet been repurchased (in full).

☐ Yes ☐ No

Current outstanding amount: CHF

e) Move to Switzerland from abroad

I moved to Switzerland from abroad during the last five years.

☐ Yes ☐ No

Date of move from abroad:

If yes: I have been insured with an employee benefits institution in Switzerland before.

☐ Yes ☐ No

(Please enclose copies of insurance certificates and/or final statements on withdrawal)

f) Early retirement and continuing to work

I have withdrawn retirement benefits due to early retirement **or** I am currently withdrawing such benefits (lump sum **or** pension).

☐ Yes ☐ No

(Please enclose pension fund certificate for the amount of withdrawal benefit at the time of early retirement)

=> Please see over!

2. Information

A. On purchasing benefits under the pension fund regulations

- a) If purchases have been made, the resulting benefits may not be withdrawn as a lump sum retirement payment, a cash payment of vested benefits or a prepayment for home ownership purposes within the three years following the purchase. In addition, if any lump-sum withdrawals are made within these three years, tax deductibility may no longer apply to purchase sums with retroactive effect. It is advisable to obtain prior clarification from the relevant tax authorities. The tax authority shall carry out an overall view of all second pillar pension assets, even if the funds are held by various pension funds.
- b) Any prepayments for home ownership must have been repaid before purchases can be made. If the insured person has reached the age of retirement following the plan regulations, this obligation does not apply. However, the purchase sum is reduced by any prepayments which have not been repaid.
- c) If an insured person has set aside pillar 3a savings during a previous period of self-employment instead of accruing BVG benefits, and these pillar 3a savings exceed a specified maximum amount, the purchase sum is reduced by the amount exceeding this specified maximum.
- d) A person who has moved to Switzerland from abroad and has previously never been a member of a Swiss employee benefits institution is not entitled to exceed the annual purchase amount of 20% of his or her annual salary insured under the pension fund regulations for the first five years following admittance to a Swiss employee benefits institution. For a person who has moved to Switzerland from abroad and has previously been a member of a Swiss employee benefits institution, this limit does not apply.
- e) Repurchases as a result of divorce / legal dissolution of a registered partnership are excluded from the above restrictions and may be made at any time.
- f) If a person who has taken early retirement continues to be employed or becomes reemployed, the purchase sum is reduced by the value of the vested benefits which he or she had accumulated at the time of early retirement.

B. On tax

- a) The calculation of the purchase amount is based on the information provided by the insured person and the data that is available to the employee benefits institution. Omissions or inaccuracies in the information given on the previous page may have tax consequences for which the insured person bears sole responsibility.
- b) The tax deductibility of the purchase amounts is determined in accordance with federal and cantonal tax regulations. The employee benefits institution does not guarantee the tax deductibility of such amounts and accepts no liability whatsoever in this regard.

More information can be found in the pension fund regulations.

If you answered no to all the questions in this form, you can transfer your buy-back into the pension fund's bank account. If a question has been answered with yes, this information will be taken into account when making a purchase.

I confirm the information given on the previous page and acknowledge that I have taken note of the above information on purchasing benefits back benefit reductions and tax.

Place and date:

Handwritten signature of insured person*:

.....

.....

* Digital signatures are not accepted.