

Encouragement of Home Ownership *Application for a Withdrawal*

Please complete and return this application form

I, the undersigned :

Surname, first name :

Insured person no.

Marital status : ☐ single, divorced, court-dissolved civil partnership, widowed, civil partnership dissolved by death

So that the request is valid, please join an official civil status certificate or (if this is not possible) an affidavit of civil status to this request.

☐ married, registered in a civil partnership within the meaning of the Law of 18 June 2004 on registered civil partnerships between persons of the same sex

Surname and first name
of your
spouse / partner
within the meaning of the
LPart/PartG : _____

wish to obtain a withdrawal of :

☐ the maximum amount to which I am entitled on the day of payment

☐ CHF _____ (fixed amount)

☐ on (date) _____

to finance the purchase of a residential property consisting of

☐ an apartment

☐ a single-family home

Form of ownership

☐ individual ownership

☐ co-ownership

☐ joint ownership with my spouse / partner within the meaning of the LPart/PartG

☐ an independent and long-standing right to build a residence on leasehold property

I am using this amount to :

O acquire a residential property

O construct, renovate, or convert a residential property

O repay a mortgage.

O acquire co-ownership of a residential property:

- ☐ partial interest in a cooperative residential association
- ☐ shares in a publicly-owned, residential rental property
- ☐ the granting of a profit-participation loan to a non-profit residential organisation

I am enclosing :

O in case of construction, purchase, or conversion of a residential property

- ☐ recent extract from the Land Registry
- ☐ purchase contract for the property or a pre-purchase contract (notarized deed)
- ☐ building permit
- ☐ builder's contract (including plans)
- ☐ construction account and confirmation from the bank that the pension assets will be used exclusively for the construction of a residential property.
- ☐ outstanding invoices from contractors (in the case of a conversion)
- ☐ domicile or residence certificate or an undertaking that you will live in the residential property

O in case of repayment of a mortgage loan

- ☐ recent extract from the Land Registry
- ☐ bank statement showing the amount of the mortgage to be repaid
- ☐ domicile or residence certificate

O in case of acquisition of a partial interest

- ☐ regulations or statutes of the cooperative residential association
- ☐ regulations or statutes of the publicly owned, residential rental property
- ☐ agreement on the purchase of a partial interest
- ☐ agreement on the purchase of shares
- ☐ profit-participation loan contract
- ☐ domicile or residence certificate or an undertaking that you will live in the residential property

I certify that :

O I have made one or more purchases within the past three years :

1. CHF _____ date _____
2. CHF _____ date _____
3. CHF _____ date _____

O I have not made any purchases within the past three years:

Payment :

Provided that my application is accepted, please pay the requested amount:

in favour of :

address :

details of bank

account

Post Office account

(CCP) :

Notarised original signatures

I have read and understood the document “Guide to Applying for a Withdrawal of Pension Assets” and agree to comply with its contents.

I also acknowledge that the application will only be processed once the one-off fee of CHF 150.00 has been received.

Account holder: Pensionskasse der Lonza, Münchensteinerstrasse 38, 4052 Basel. IBAN number Credit Suisse: CH54 0483 5032 2601 6100 1.

The undersigned authorise(s) the registrar at the Land Registry to enter a restriction on the right of sale once the withdrawal has been made.

Place and date :

Notarised original signature of member :

Consent of the spouse / partner within the meaning of the LPart/PartG

So that the request is valid, your signature (and if married or in a registered partnership also of the spouse or registered partner) has to be authenticated by a notary direct on this form.

Place and date :

Notarised original signature of spouse/partner,
within the meaning of the LPart/PartG :
