

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.

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Personal details

Name of employer/foundation

Contract number

AHV number

Last name

First name

Date of birth

Home town

Gender

male

female

Street, no.

Zip code, town or city, country

Home phone number

E-Mail

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Amount withdrawn in CHF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 Insurance Company Ltd
Help Point 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.