



# Encouragement of home ownership checklist: Documents required for the transfer of an early withdrawal that has already been made

Do you wish to transfer an early withdrawal that has already been made to finance your new residential property? This checklist will help you remember all the documents you need in order to comply with the conditions stipulated by law.

	Purchase of residential property	Construction / building of residential property	Transfer to an existing vested benefits institution
<input type="checkbox"/> <b>Request for the transfer of an early withdrawal that has already been made</b> →  Can be downloaded at <a href="http://www.vita.ch">www.vita.ch</a>	●	●	●
<input type="checkbox"/> <b>Copy of the extract from the land register for the property in which the original amount of the early withdrawal is being invested (no more than 1 month old).</b> The copy is only needed if the application for registration in the land register has already been made for this property. →  Available at a charge from your land registry office	●	●	
<input type="checkbox"/> <b>Officially notarized contract of sale or final draft version</b> Important: The date of the transfer of ownership should be evident from the contract of sale. As an alternative, you can send notarial confirmation of the date of the transfer of ownership.	●	●	
<input type="checkbox"/> <b>Current certificate of marital status / civil status certificate (no more than 1 month old) for single persons</b>	●	●	
<input type="checkbox"/> <b>Copy of the passport / identity card of the applicant and that of the applicant's spouse or registered partner</b> Important: The signatures should be clearly discernible. A copy of your driver's license is not sufficient.	●	●	
<input type="checkbox"/> <b>Bank confirmation with the following information:</b> <ul style="list-style-type: none"> <li>– Confirmation that the amount originally used was used to purchase or construct the new property</li> <li>– Amount originally used to invest in the new property</li> <li>– Address of the new property in which the early withdrawal is being invested</li> <li>– Confirmation that the new property is owner-occupied residential property</li> </ul>	●	●	
<input type="checkbox"/> <b>Copy of the receipt of the cost contribution as per the offer</b> If the early withdrawal has been made from a Vita Joint Foundation or a joint foundation of Zurich Life Insurance Ltd, the cost contribution does not have to be confirmed.	●	●	