



How to make a purchase in the pension fund

By buying into the pension fund, you can simultaneously increase your retirement benefits, close any contribution gaps and reduce your tax burden. In addition, you benefit from the interest earned on your capital.

1.

Determine your purchase amount

On your pension certificate, you will find your purchasing potential, i.e. the maximum amount you can pay in.

2.

Please check whether the following applies to you:

You made an early withdrawal of pension savings to fund the purchase of residential property.

You were self-employed and paid into pillar 3a during this period.

You moved here from another country.

You have entitlements from a vested benefits account.



If any of these points applies, your purchasing potential could be less than stated on your pension certificate. Please make the appropriate entries under point 3 of the form and enclose the necessary supporting documents. We will contact you if your purchasing potential is less than the desired purchase amount.

You would like to receive benefits in the form of a lump sum over the next three years.



If you have made a purchase, you may not claim any benefits in the form of a lump sum in the next three years.

You had to surrender part of your pension savings to your former spouse following a divorce.



In this case, you can make up for this shortfall of retirement provision at any time and without any restrictions by making a purchase.

Please note that the tax authorities might not recognize, or at least might not fully recognize, the purchase for purposes of a tax deduction. For information on tax matters please contact your tax authority before making a purchase.

3.

Please complete the form and return it to us

By e-mail to:
bvg@zurich.ch

By mail to:
**Zurich Switzerland
Scanning BVG
P. O. Box
8085 Zurich**

4.

Please transfer the amount using the attached payment slip or via online banking

Please make sure that we receive the amount by December 31 at the latest.

5.

We will send you a confirmation of the purchase for your tax return and the new pension certificate



Do you have questions regarding your purchase?

Help Point BVG (phone 0800808080) is available to answer your questions from 8 a. m. to 6 p. m. from Monday to Friday.



Purchase of pension fund benefits

1 Personal details

Name of the employer	
Contract number	
AHV number	
Last name	First name
Street, no.	Zip code, town or city, country
Private telephone	Private Email

◀ Your **contract number** can be found on your pension certificate.

2 Desired purchase amount

You wish to transfer the following amount:

Amount in CHF

3 Additional information concerning the purchase

To enable us to process your purchase into the pension fund correctly, we need the following information from you: it will influence your purchasing potential.

Have you made an early withdrawal of pension savings to fund the purchase of residential property?

No | Yes

Have you ever been self-employed and paid into pillar 3a?

No | Yes

▶ **Documents required**

Please enclose a copy of the current account statements for your pension accounts and a confirmation of the current cash values of your pension policies.

Have you moved to Switzerland from another country in the last five years?

No | Yes

When did you move here and first join a pillar 2 pension plan?

Date of move to Switzerland

Date of joining pillar 2

Do you have any further claims from pillar 2, such as from a vested benefits account or a vested benefits policy?

- No | Yes

▶ **Documents required**

Please enclose a copy of the current account statements for your vested benefit accounts and a confirmation of the current cash values of your vested benefit policies.

Are you drawing or have you ever drawn retirement benefits (retirement pension and /or retirement savings capital) under an earlier pension plan?

- No | Yes

▶ **Documents required**

Please enclose a copy of your most recent pension certificate. It must clearly show your savings capital at the time of retirement.

4 Confirmation

- I confirm that I have truthfully answered all questions and have taken note of the regulations concerning purchases and of the information provided above.

Deposit slip



How to pay into the second pillar

Please fill in the "Additional information" field as detailed below.
This will enable us to match your payment with the correct contract.

1. **Policy number**
2. **Last name, first name** (of the insured person)
3. Intended purpose:
 - **Purchase** (financed by employee)
 - **Repayment of early withdrawal** (financing of residential property)
 - **Repayment of divorce settlement** (payment transferred to former partner due to divorce)



Receipt

Account / Payable to
CH18 0023 0230 3016 4202 C
Sammelstiftung Vita
Hagenholzstrasse 60
8050 Zürich

Payable by (name/address)

Currency Amount

CHF

Acceptance point

Payment part



Currency Amount

CHF

Account / Payable to
CH18 0023 0230 3016 4202 C
Sammelstiftung Vita
Hagenholzstrasse 60
8050 Zürich

Additional information

Payable by (name/address)

