

# Purchase of pension fund benefits

By buying into the Vita Plus Joint Foundation, 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 Personal details

To identify you we need at least one of the following three pieces of information:

Name of your employer

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Contract number

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AHV number

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We need all the following information:

Last name

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First name

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Street, no.

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Zip code, town or city, country

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Home phone number

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Email

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### Deadline

Your purchase amount must be received by us by December 31 at the latest so that we can take your payment into account for the current fiscal year. We recommend that you transfer the amount as early as possible.

### Note

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

## 2 Desired purchase amount

You wish to transfer the following amount:

Amount in CHF

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### Note

If you are using online banking to make your transfer you will have to indicate your contract number under «purpose» (Verwendungszweck).

### Note

Your **purchasing potential** is indicated on your pension certificate.

# 3

## Additional information concerning the purchase

In order for us to correctly process your purchase of pension benefits, we need the following information:

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

- No  Yes

**Please note**

Before you can make a purchase you first have to repay the early withdrawal.

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

- No  Yes

**Please note**

Your purchasing potential will be reduced by any assets from pillar 3a that exceed the legal maximum for dependent employees.



**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 and never previously belonged to a Swiss pension plan under pillar 2?

- No  Yes

#### When did you first join a pension plan of pillar 2?

Date

**Please note**

In this case, your purchase amount in the first five years after joining a Swiss pension plan may be no higher than 20% of your insured salary according to regulations.

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

- No  Yes

**Please note**

Your purchasing potential will be reduced by your further claims from pillar 2.



**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

**Please note**

Your purchasing potential will be reduced by the assets already paid out under your former pension plan.



**Documents required**

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



### Savings capital (retirement savings capital)

Savings capital is money paid into pillar 2 by the employer and the employee during the employee's working life. The savings capital, plus interest, is available for your pension on retirement. At least half of this is funded by the employer.

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## 4 Important to know

If you have purchased pension fund benefits, you may not claim any benefits in the form of a lump sum for the next three years. This concerns capital payments on retirement, for instance, as well as early withdrawal to fund the purchase of residential property or the cash payment of vested benefits on leaving a position of employment.

If you have to surrender part of your pension savings to your former spouse following a divorce, you can make up for this pension shortfall 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.

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## 5 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.

Place, date	Signature
	Name of your advisor

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## 6 What happens next?

As soon as we have received and reviewed your documents and your payment in relation to your purchase of pension fund benefits, we will issue your new pension certificate and your tax certificate.

Please send 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.

# 7 Deposit slip

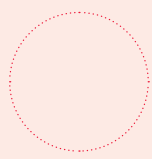
Please use this deposit slip to purchase pension benefits with the Vita Plus Joint Foundation if your contract number has the format 123'456/000 (contract number with slash).

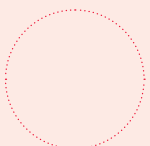
## Note

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

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Detach from the deposit slip

Empfangsschein / Récépissé / Ricevuta	+ Einzahlung Giro +	+ Versement Virement +	+ Versamento Girata +
<b>Vested benefits</b>  Last name _____  _____	Please check appropriate type of purchase: <input type="checkbox"/> Purchase financed by employee <input type="checkbox"/> Repayment of withdrawal (financing of residential property) <input type="checkbox"/> Repayment of benefits transferred to ex-partner following divorce  Contract no.: _____ / _____ Last name, First Name: _____		
Einzahlung für / Versement pour / Versamento per <b>UBS AG, 8098 Zürich</b> Zugunsten von / En faveur de / A favore di <b>CH34 0023 0230 P059 0000 0</b> Zürich, Lebensversicherungs-Gesellschaft AG, 8045 Zürich Konto / Compte / Conto <b>80-2-2</b> <b>CHF</b> [ ][ ][ ][ ][ ][ ][ ][ ][ ] . [ ][ ][ ] Einbezahlt von / Versé par / Versato da  _____ _____ _____	Einzahlung für / Versement pour / Versamento per <b>UBS AG, 8098 Zürich</b> Zugunsten von / En faveur de / A favore di <b>CH34 0023 0230 P059 0000 0</b> Zürich, Lebensversicherungs-Gesellschaft AG, 8045 Zürich Konto / Compte / Conto <b>80-2-2</b> <b>CHF</b> [ ][ ][ ][ ][ ][ ][ ][ ][ ] . [ ][ ][ ]  <b>202</b>	Einbezahlt von / Versé par / Versato da  _____ _____ _____ _____	



Die Annahmestelle  
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L'ufficio d'accettazione

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