



**Schindler**

## Self-declaration Application for a voluntary contribution to the pension fund

Voluntary contributions to the pension fund are regulated by law in art. 79 b BVG and art. 60a and b BVV2.  
Kindly answer the following questions completely and truthfully.

**1 Have you ever been self-employed or have you paid contributions to the pillar 3a before the age of 25?**

- No  Yes, my entire present asset in pillar 3a is  
(Confirmation of the bank or insurance company to be enclosed):

CHF  as at

**2 Have you got any assets in other occupational benefits institutions or vested benefits institutions?**

- No  Yes, my entire present asset in other occupational benefits institutions or vested benefits institutions in pillar 2 amounts to (confirmations or bank statements to be enclosed):

CHF  as at

**3 Have you immigrated to Switzerland from abroad within the last 5 years?**

(valid also for Swiss citizens)

- No  Yes *If yes, date of move*

*If yes, have you been a member of a Swiss pension fund before?*

- No  Yes *If yes, please let us have a statement of the retirement benefits (insurance certificate or settlement of vested benefits).*

**4 I already draw retirement benefits from another pension fund**

- No  Yes, I have already received a retirement lump-sum or a retirement pension  
(a statement of the retirement benefits to be enclosed)

**5 I have made an advance withdrawal for residential property in connection with the encouragement of home ownership** (in case of several withdrawals, please enclose a separate list stating the date, the amount and the corresponding pension fund):

- No  Yes Date  Amount

**6 I am aware of the fact, that the voluntary contribution (including interest payment) to the pension fund cannot be withdrawn in form of a lump-sum within the following 3 years thereafter.**

- Yes  No, I don't want to make a voluntary contribution

**7 I would like to pay CHF**  **as at**

Surname \_\_\_\_\_ AHV-Nr. \_\_\_\_\_  
First name \_\_\_\_\_  
Address \_\_\_\_\_ Place, date \_\_\_\_\_  
Telephone \_\_\_\_\_ Signature \_\_\_\_\_