

# Voluntary contribution to the pension fund

Art. 79 BVG, Art. 60 BVV2

<b>Insured person</b>		
<b>Policy number</b>	51/	
1. What amount would you like to transfer?	CHF	
2. Have you ever been self-employed and paid into pillar 3a?	Yes	No
If yes, what is the value of the assets?	CHF	
3. Do you have occupational pension (Pillar 2) assets that have not been transferred to the pension fund (e.g. a portable benefits policy or portable benefits account)?	Yes	No
If yes, what is the value of the assets?	CHF	
4. Have you moved to Switzerland from abroad within the past five years?	Yes	No
If yes, when did you move to Switzerland?		
5. Have you made any advance withdrawals to finance your own home that you have not yet fully repaid?	Yes	No
If yes, what was the value of the withdrawal?	CHF	
What was the date of the withdrawal?		

If you have answered all the questions with “no”, then you are free to make a purchase of additional pension benefits. Please use the account detailed overleaf for the transfer of the funds and return this form to us. After we have received the payment, we will send you a corresponding tax certificate.

If you have answered “yes” to one or more questions, please return this form to us along with the relevant supporting documents. We will then calculate your maximum permitted purchase amount and notify you of this.

## Confirmation

I confirm that I have answered all the questions truthfully and that I have taken note of the regulatory provisions governing voluntary additional purchases.

Place, date

Signature of the insured person

### Important information

- The tax certificate will be dated according to the date of receipt of payment. Towards the end of the year, we recommend that you make payment early enough, so that your tax certificate can be issued for the current year.
- The account details below should be used only for a voluntary contribution out of your personal assets.
- Further information can be found under “Information sheets” at: [www.baloise.ch/BVGdocuments](http://www.baloise.ch/BVGdocuments)

### Payment details for your voluntary purchase of additional pension benefits

Payment to	Baloise Life Ltd, 4002 Basel
Account number	CH56 0900 0000 3029 0259 0
Reference	Purchase of contributory years 51/

### Restrictions

- If you are also insured with another pension fund, you have to specify whether the retirement assets currently available in that pension fund exceed the maximum possible regulatory retirement assets. The excess amount must be taken into account in the purchase calculation and reported to us.
- If you have moved to Switzerland from abroad and have never before moving previously belonged to a pension fund in Switzerland, then, during the first five years after joining a Swiss pension fund, your voluntary contributions are restricted to an annual maximum of 20% of your regulatory pensionable salary.
- If you have made an advance withdrawal to finance your own home, then you must pay back the advance withdrawal amount (excluding interest) before you can make a voluntary purchase.
- If you have made a voluntary purchase, you are not entitled to withdraw the resulting benefits as a lump sum for a subsequent period of three years. This includes, for example, lump-sum payments at retirement, an advance withdrawal to finance your own home or a cash withdrawal of portable benefits upon leaving the pension fund.