

Application for Retroactive Payment into Pillar 3a

The Insured

<input type="checkbox"/> Mr		<input type="checkbox"/> Ms	
Surname		First name	
Street		Postcode, Place	
Telephone		E-mail	
Date of birth		Insured no.	756.

Relevant questions

Did you have an income subject to OASI contributions for the year or years for which you wish to make a retroactive payment? 1)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you have an income subject to OASI contributions for the current year? 1)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you already paid in the maximum amount for pillar 3a in the current year? 1)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are you at least 60 years old and have you already withdrawn funds from your pillar 3a? 2)	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Gap

How big is the gap you would like to close?	CHF		Year
In which year did the gap arise (2025 or later)? 3)	CHF		Year

- 1) Only those who answer yes to all three questions are eligible for retroactive payments.
- 2) Once you have withdrawn funds from your pillar 3a account, you can no longer make retroactive payments.
- 3) The maximum amount that can be made up each year is the current maximum limit for pillar 3a.
 The contribution shortfall for a given year may only be made up by a single top-up payment.

Signature

By signing, I confirm that the information provided is correct.

Place, Date

The insured

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