

Application for early withdrawal

Promotion of home ownership

Portfolio no.

The Insured

☐ Mr	☐ Ms		
Surname		First name	
Street		Postcode, place	
Telephone		E-Mail	
Date of Birth		Insured no.	756.
Marital status	☐ Single	☐ Married	☐ Separated
	☐ Divorced	☐ Widowed	☐ Other

Documentation: Proof of marital status for unmarried persons

Have you ever requested an advance withdrawal in the past?	☐ No	☐ Yes, Date		Amount	
Have you requested a purchase of additional benefits in the past three years?	☐ No	☐ Yes, Date		Amount	

Request for advance withdrawal

Amount CHF		or	☐ max. amount available
Preferred date of advance withdrawal			

Bank details for payment

Name		Contact person	
Street		Postcode, Place	
Telephone		E-Mail	
IBAN		Account holder	

(Bank details of the vendor, the mortgage company or of the residential property builder) No direct payment to the insured person!

Purpose of advanced withdrawal:	☐ Construction of residential property as the building's owner, or under a contract for work and services
	☐ Conversion/renovations (only possible for investments that increase / maintain the value)
	☐ Purchase of existing residential property
	☐ Repayment of the building loan in order to acquire home ownership
	☐ Repayment of a mortgage on my own residential property
	☐ Purchase of share certificates in a residential building cooperative

Property

☐ Single family house	☐ Apartment		
Street		Folio	
Postcode, Place		Cadastre no.	
☐ Sole ownership	☐ Joint ownership (husband and wife only)		
☐ Co-ownership	☐ Distinct and permanent building right		
Moving-in date			

Costs / Mortgage

Purchase price, respective price of construction	CHF	
Mortgage / Loan on the residential property	CHF	

Land registry in charge

Name		Telephone	
Street		Postcode, place	

Personal use: ☐ The property is occupied by me / my family as my / our domicile or normal place of residence.

No financing for secondary or holiday residences!

Important:

Payment for purchase of building plot or for financing mortgage interests is not possible.

According to the legal regulations the advance withdrawal is to be finalized within 6 months following submission of the completed application, together with all required documents. For construction or purchase of residential property, the advance withdrawal can only be finalized after transfer of the ownership in the land register.

I hereby acknowledge that the Tellco Vested Benefits Foundation will charge a fee for the processing of this application in accordance with the Fees and Charges Policy. I hereby declare that I am aware of the information relating to the advance withdrawal. I accept that the restriction on alienation is noted in the land register in accordance with art. 30e LPP. Tellco Vested Benefits Foundation will assume the fee for this note. We reserve the right to demand the original documents.

	certified signature*	certified signature*
Place, Date	The Insured	Spouse

* Through the notary or the municipality.

Documents to be submitted for the application for early withdrawal

Preparation

- Purchase contract and land registry record*
- Contract for work and services
- Building permit with certificate of appeal
- Confirmation of residence (after moving in)

Purchase

- Purchase contract and land registry record*
- Confirmation of residence (after moving in)

Amortisation of a mortgage

- Current land registry record*
- Current confirmation of residence
- Confirmation from the bank regarding the mortgage and that this can currently be amortised by the aforementioned amount, incl. IBAN / payment details

Purchase of shares

- Original shares
- Confirmation and regulations of the housing association

Conversion / renovations

- Current land registry record*
- Current confirmation of residence
- Documents concerning the conversion (quotations, plans, building permit, etc.)

If the property is located abroad or the buyer does not have Swiss citizenship:

Corresponding officially certified documents, copy of passport / ID and copy of foreign national's ID document

* For properties in France: relevé de propriété.