

Request for calculation of the maximum repurchase



Company: Contract n° :

Personal data of the insured

Name and first name: Date of birth:

Address:

Civil status: single married divorced widow(er)
 bound by a registered partnership partnership dissolved

Work Phone No.: Home Phone No.:

Information concerning 2nd pillar assets

1. Have you benefited from an advance payment for the purchase of housing that you have not yet repaid? yes no
2. Have you already received or are now receiving a retirement benefit from a former pension institution? yes no
3. Do you possess a/some vested benefit account(s)/policy(ies)? yes no

If yes, please provide us with account extracts and complete the following:

<u>Name and address of the bank/insurance</u>	<u>Vested benefit on 31.12.</u>
1.
2.

Information concerning pillar 3a assets

1. Do you possess a/some pillar 3a account(s)/policy(ies)? yes no

If yes, please provide us with extracts/taxation confirmations and complete the following:

<u>Name and address of the bank/insurance</u>	<u>Balance/repurchase value on 31.12.</u>
1.
2.

Complementary information in case of arrival from abroad

1. Did you arrive from abroad during the course of the last five years? yes no

If yes, date of arrival in Switzerland:

Were you already insured with a pension fund in Switzerland before leaving for abroad? If yes, please include your last insurance certificate and/or exit balance.

yes no

We draw your attention to the fact that the required annexes must imperatively be included with your request, failing this we will be unable to communicate the total maximum repurchase.

Place and date: Signature of the insured: