PERSONAL DETAILS OF THE INSURED

Last name: _____   First name: _____

AVS N°: _____   Date of birth: _____

E-mail: _____   Telephone: _____

Address : _____

_____

Civil status: ☐ single ☐ married ☐ registered partnership ☐ widow(er)

☐ divorced since (exact date): _____   ☐ dissolved partnership

USE OF FUNDS

The person insured certifies that the vested pension fund monies will be used for their own residential unit (main residence), which they will occupy themselves and may not rent out.

☐ Purchase of a residential unit for personal use
☐ Construction of a residential unit (funds will be disbursed at the time of consolidation of the construction loan)
☐ Reimbursement of a mortgage
☐ Conversion of a residential unit for personal use
☐ Acquisition of shares in a construction or residential cooperative
☐ Pledge

EXACT ADDRESS OF RESIDENTIAL UNIT

Street: _____

PC: _____   City: _____

OWNER OF THE RESIDENTIAL UNIT

☐ Single owner   ☐ Co-owner (..........% share)
☐ Co-owner with married partner   ☐ Owner of a housing cooperative

AMOUNT AND DATE OF THE ADVANCE PAYMENT OR PLEDGE

☐ CHF _____   (min. CHF 20'000.-)   ☐ Total amount available at the date of payment

Requested payment date: _____

ADVANCE PAYMENT ADDRESS OR PLEDGEE ADDRESS
(Please attach a payment slip or bank statement)

☐ Seller   ☐ Lender   ☐ Company   ☐ Notary   ☐ Pledgee

Last name: _____

Address : _____

IBAN (max. 34 figures): _____

Currency: ☐ CHF   ☐ EUR

Bank / Post: _____   PC, City : _____

ADDITIONAL QUESTIONS CONCERNING ADVANCE PAYMENT

Are you currently in full working capacity?   ☐ yes ☐ no

Would you like to idemnify the reduction of the disability and survivor benefits with a risk insurance whose premiums would be at your expense?   ☐ yes ☐ no

Have you made any personal repurchases during the last three years?   ☐ yes ☐ no
If so, please include a copy of the tax certificate(s) 21 EDP.

Fondation de prévoyance PROFMED & PROLIBERA
p.a. Groupe Mutuel · Passage Saint-Antoine 7 · CP · 1800 Vevey
v.07.21

GENERAL INFORMATION

Taxation

For Swiss residents the Fondation will declare the amount of the advance payment or the pledge to the Federal Tax Authority. In this case, the person insured will be required to pay a single, separate amount of tax on the capital payment from the pension fund using their own funds. The advance payment or the realization of the pledge may under no circumstances be used to pay this tax.

For persons not resident in Switzerland the Fondation must retain the tax at source.

Registration with the Land Register (only applicable to advance payment)

The Fondation must require the Land Register to request approval of the right to sell. The costs related to this registration are at the expense of the person insured. For Swiss residents the Fondation itself requests this registration with the Land Register (Art. 30e LPP).

Reimbursement of the advance payment

It is possible for the person insured to reimburse the advance payment or pledge by making payments of at least CHF 10'000.-.

Furthermore, he has the obligation to reimburse the Fondation should the residential unit be sold or the conditions of its use no longer fulfilled. In this case, the person insured who must inform the Fondation of the new situation has the right to request the reimbursement of the taxes paid when the advance payment was made.

APPENDICES

The following supporting documents must be submitted with this request:

To be included in all cases:

- Copy of a valid identity document
- Copy of a valid identity document for the spouse/registered partner
- If you are not married or in a registered partnership, a certificate of your current civil status (dated less than one month ago)
- If you are divorced or your partnership has been legally dissolved within the last 6 months, a copy of the divorce decree or the enforceable and complete judgement of the dissolution of your partnership (foreign divorce decrees must be recognized and enforced by a Swiss court)

In the following cases:

1. For the acquisition of an existing principal residential unit

- A notarized copy of the sale or project contract
- Certification from the notary or creditor that funds have been paid (see below)
- Bank or notary confirmation that funds have been paid

3. For the conversion of a principal residential unit

- Extract from the Land Register dated less than 30 days prior or an Ownership Statement for buildings abroad (covering the land plot or the extract covering the residential unit)
- A detailed description of the work foreseen in the residential unit and the estimated costs
- Certification from the mortgage holder that the advance payment transferred shall be used for conversion work exclusively and that otherwise the amount received shall be returned to the Fondation

5. To pay off a mortgage

- Extract from the Land Register dated less than 30 days prior or an Ownership Statement for buildings abroad (covering the land plot or the extract covering the residential unit)
- A current statement concerning the mortgage

2. For the acquisition of shares in a residential property

- Shares in a building or residential cooperative, shares in a tenant-public limited company or a parity loan to a public utility construction body (originals)

4. For the construction of a principal residential unit

- Extract from the Land Register dated less than 30 days prior or an Ownership Statement for buildings abroad (covering the land plot or the extract covering the residential unit)
- A copy of the notarized sales or project contract
- A copy of the general contractor or architect's contract (also mentioning the date of completion of work)
- Notary or mortgage holder confirmation that funds have been paid (see below)

CERTIFICATION FROM THE NOTARY OR MORTGAGE HOLDER

Must clearly state:

- The address of the real property
- The amount requested
- The payment information
- The remaining balance of the mortgage at the desired payment date to amortize the loan
- The commitment that the funds paid shall be returned should the transaction not take place

Must certify that the sum paid shall be:

- (Notary) used exclusively as equity capital for the acquisition / construction / renovation of the stated real property in conformity with the legal dispositions regarding the Encouragement of Home Ownership and its Ordonnance
- (Mortgage holder) used exclusively for the amortization of a mortgage on the stated real property in conformity with the dispositions of the Federal Law regarding the Promotion of Home Ownership and its associated Federal Ordinance

The Fondation reserves the right, if necessary, to request further supporting documentation.

SIGNATURES

I formally recognize herewith that the pension institution will register a sales restriction with the Land Register and declare that all the information supplied above is true and correct.

Place, date: .... Signature of the insured: ....

Place, date: .... Signature of the spouse registered partner: ....

In the case of persons who are married, separated or in a registered partnership, the signatures of the pension fund member and his/her spouse/registered partner must be certified by a notary.

Authentication of the signature of the spouse/registered partner

.... (seal and signature)