Print Reset

Request for advance benefits withdrawal for Home ownership

Policy no.

Policyholder

First name and last name

Date of birth

Street address

Postcode and town

AHV no.

Nationality

7 5 6 . . . .

Can be reached for questions at telephone number / E-mail address

Marital status

- ☐ I am married
- ☐ I am separated
- ☐ I am divorced
- ☐ I live in a partnership dissolved by decree
- ☐ I live in a registered partnership
- ☐ I am single
- ☐ I am widowed
- ☐ I live in a partnership dissolved due to death

Conditions

The home ownership act (WEF) requires us to ensure that the requirements for an advance withdrawal are met. Therefore please complete this form and return with all requested supporting documents for our review.
Please note that an advance withdrawal is possible only every five years. This provision is laid out in the Ordinance on the Tax Deduction of Contributions to Recognized Pension Plans (BVV3) of November 13, 1985. In addition, an early withdarawal to finance a property is only possible up to 5 years before the person reaches the AHV retirement age. Afterwards, the full retirement benefits can be withdrawn without any preconditions.

Type of advance withdrawal

I request the following advance withdrawal of the surrender value of my policy:

- ☐ Completely
- ☐ Partially, in the amount of CHF _____
- ☐ Immediately
- ☐ As of _____ (day, month, year)

The payment will be made as soon as we have received and checked all the necessary documents.
For unit-linked policies, payment can only be made after the fund units have been sold.

The insurance should then be

- ☐ continued with the same premium.
- ☐ canceled.
- ☐ continued in a different from. Please contact your advisor if you have any questions. He would be glad to inform you about your options.

Purpose

I hereby confirm that the advance withdrawal will be used to purchase a home for my own use:

Type	**Please attach the following documents** (copy)
☐ Purchase of existing residential property	– Signed sales contract, or land register extract if available (not older than 6 months).
☐ Construction of new residential property	– Land register extract (not older than 6 months), or signed land purchase or reservation agreement. – Building permit – Mortgage or construction loan account statement (not older than 6 months), confirmation by the bank that the account will be used solely for construction of the home, or contract for work and labor.
☐ Renovation of existing residential property	– Land register extract (not older than 6 months) – Building permit, if legally required for the renovation – Invoice from workers (unpaid invoices only) or contract for work and services.

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AXA Life Ltd.
PO Box 300, CH-8401 Winterthur

☐ Repayment of mortgage loan
– Extract from the land register (not older than 6 months)
– Mortgage account statement (not older than 6 months)

☐ Holdings in the residential property
– Shares in a cooperative, shares in a tenant company, or a loan to a charitable residential property developer.

Type of residential property

☐ Single-family home

☐ Apartment

The residential property is or will be located at my civil-law domicile or primary place of residence. I am or will be the sole resident and the property is not a holiday home.

☐ Yes Adress _____

☐ No

Owner

I am or will be:

☐ the sole owner

☐ the joint owner with my spouse / registered partner
(advance withdrawal by joint owners plus a third party is not permitted)

☐ co-owner, at _____ %

☐ holder of an independent and permanent right to build

☐ holder of a participation certificate in a building association or of similar kind of participation.

Payment details

Please transfer the amount to the following account:

IBAN C H

IBAN abroad

Financial institution (name and place)

*Swift code (BIC) of bank in case of payment abroad

*The Swift code (BIC) is essential for payments to an account with a bank in an EU country. You will find this information on your bank statement, or ask your financial institution.

Pledge

If this policy has been pledged, we must have the pledge holder's consent before the funds can be transferred. We will not process payment unless we have proof that the pledge has been removed.

Tax notification

If the policyholder or a beneficiary is living in Switzerland when an insured event occurs, the insurance benefit must be reported to the Federal Tax Administration. This obligation to notify does not apply to lump sum payments up to CHF 5,000, although partial payments are cumulated. Purchases of benefits from a tax exempt occupational benefits institution do not need to be reported.

Place and date

Signature of the policyholder

Place and date

Signature of spouse / registered partner

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