

## Declaration

### Purchase confirmation about vested benefits and Pillar 3a assets

#### Insured person

Nom, prénom \_\_\_\_\_

Street,, n° \_\_\_\_\_

Postcode, town \_\_\_\_\_

- I herewith declare that I have no claims to vested benefits from previous employment relationships that have not been brought into the Pensionskasse der Saurer-Unternehmungen nor do I have any Pillar 3a assets acquired before the age of 25 or as a self-employed individual.
  
- I herewith declare that I have the following claims to vested benefits from previous employment relationships or Pillar 3a accounts:
  - Vested benefits policy
  - Vested benefits account
  - Assets with another pension scheme
  - Pillar 3a account (payments before age 25 or as a self-employed individual)
  
- My assets are held at:  
(please enclose latest account statement)

Name and address	Amount	Value date
_____	_____	_____
_____	_____	_____
_____	_____	_____

Before a purchase can be made, all assets held in vested benefits accounts, vested benefits policies and Pillar 3a accounts (payments before age 25 or as a self-employed individual) and all advance withdrawals to finance home ownership have to be disclosed. The maximum purchase amount is reduced by the total amount of the retirement assets invested outside of the Pension Fund.

The tax deductibility of the contributions used to purchase service years is governed by federal and cantonal tax regulations. Failure to provide the above information or wrong information can have tax consequences for which the insured person bears full responsibility.

If purchases are made, the resulting benefits may not be withdrawn as a lump sum from the Pension Fund in the following three years.

I have noted the content of this letter:

\_\_\_\_\_  
Place and date

\_\_\_\_\_  
Signature of the insured person