

## Pictet Individual Pension Foundation (3<sup>rd</sup> Pillar A)

### Encouragement of home ownership

Please complete in capital letters and send the original form to:

Pictet Individual Pension Foundation (3<sup>rd</sup> Pillar A) – Route des Acacias 60 – 1211 Geneva 73

Should you need any assistance, please do not hesitate to contact us:

Tel. 058/323.29.60 – E-mail: pension@pictet.com

Account no.: \_\_\_\_\_

**Account holder**       Mrs       Mr

Last name: \_\_\_\_\_ First name(s): \_\_\_\_\_

Date of birth: \_\_\_\_\_ AVS no.: \_\_\_\_\_

Street and no.: \_\_\_\_\_ Postal code/City: \_\_\_\_\_

Marital status: \_\_\_\_\_ Work tel.: \_\_\_\_\_

Home/mobile tel.: \_\_\_\_\_ Email address: \_\_\_\_\_

Amount:               Total                       Partial: CHF \_\_\_\_\_

Date of withdrawal: \_\_\_\_\_

Would you like to close your account after your withdrawal?       Yes       No

Has an early withdrawal or pledge been executed in the past 5 years?       Yes       No

Legally, this kind of payment can only be requested once every 5 years.

- Proposed use**
- To buy (copy of deed of sale)
  - To build (proof of building loan)
  - To renovate (extract from Land Register, copies of workmen's invoices)
  - To repay/pay off a mortgage (extract from Land Register, proof of mortgage)
  - To acquire shares in a housing cooperative (lease, confirmation from cooperative)

#### In all cases, the Foundation requires the following documents:

- A statement from a notary or the bank certifying that the pension assets will be used for the principal residence.  
**Furthermore, the bank or notary must give the details of the bank account into which the assets are to be paid.**
- A recent (maximum of 3 months) copy of a civil status record.

This form must be signed by the spouse or registered partner.

The signature of the spouse or registered partner has to be authenticated by a notary, bank, local authority or our foundation.

For processing applications to participate in the home ownership incentive scheme, a contribution to the costs incurred is charged in accordance with the list of fees.

Following the acceptance of my application by the Pictet Individual Pension Foundation (3<sup>rd</sup> Pillar A), I agree to the shares in my portfolio(s) being sold. A period of at least 4 working days is necessary to execute the transfer of funds.

I certify that the information given above, and the documents supplied, are accurate and complete. I authorise the Pictet Individual Pension Foundation (3<sup>rd</sup> Pillar A) to carry out the necessary additional checks.

Date: \_\_\_\_\_ Signature of  
account holder: \_\_\_\_\_

Date: \_\_\_\_\_ Signature of spouse/  
registered partner: \_\_\_\_\_