

## **Voluntary buying into the Pension Fund**

### **Legal Foundation**

According to Art. 3 FZG, upon changing jobs both the vested benefits withdrawn from the previous pension plan and any additional assets held in Pillar 2 occupational benefit schemes must be paid in to the new employer's pension plan.

Since 1 January 2006, when calculating the possible voluntary purchasing sum, all available vested benefits from Pillar 2 must be taken into consideration even if they are not subject to compulsory transfer, i.e. they are independent of a change of job (Art. 60a, Para. 2 BVV2).

In the case of previously self-employed persons, the tied vested benefits (Pillar 3a) must additionally be taken into account to a certain degree (Art. 60a Para. 3 BVV2).

Furthermore, the possibilities of buying into the pension fund when arriving from abroad after 1 January 2006 are limited (Art. 60b BVV2).

If an additional purchasing sum is paid in to the pension plan, then according to Art. 79b, Para. 3 BVG benefits resulting from this may not be withdrawn from the pension plan in the form of capital for the next 3 years.

### **Adherence to the legal requirements/Declaration by the insured person**

In order to permit clarification of the entitlement to buy into the Pension Fund and the level of the maximum permissible amount, the insured person must answer a number of personal questions in respect of his/her insurance situation or provide certain particulars.

If buying into the Pension Fund is desired, the Declaration/Confirmation on the reverse must be completed and signed and returned to:

Ascaro Vorsorgestiftung  
Belpstrasse 37  
3000 Bern 14

## Declaration/Confirmation in respect of buying into the Pension Plan

Name \_\_\_\_\_ First name \_\_\_\_\_

Address \_\_\_\_\_ Postcode/City \_\_\_\_\_

On the basis of the Legal Foundation indicated overleaf, **I confirm that**

(Please place a cross as appropriate)

1.  no vested benefit accounts or policies in the context of Pillar 2 exist  
 the following vested benefit accounts/policies exist in the context of Pillar 2 (Please attach the account statements):

Balance/Surrender value as at 31.12..... Name/address of the bank/insurance company

\_\_\_\_\_  
\_\_\_\_\_

**2. For previously self-employed persons**

- no vested benefit accounts or policies exist in the context of Pillar 3a tied vested benefits  
 the following Pillar 3a accounts/policies exist (Please attach the account statements):

Balance/Surrender value as at 31.12..... Name/Address of the bank/insurance company

\_\_\_\_\_  
\_\_\_\_\_

**3. For persons coming from abroad**

- I have not arrived from abroad during the last 5 years  
 I arrived from abroad on \_\_\_\_\_ and  
 was previously insured under a Swiss pension scheme (Please attach the insurance statement and/or the withdrawal statement)

### Further questions that must be answered

Are you currently fully fit for work or capable of gainful employment? \_\_\_\_\_

Have you to date ever made an advance withdrawal to fund home ownership, which is still not paid back in full?

yes  no

Domicile/Date

Signature of the insured person

\_\_\_\_\_  
\_\_\_\_\_