

Questionnaire for calculating maximum possible purchase

Please complete in BLOCK CAPITALS. Forms completed in full save you and us extra work.

Notes

What effects does a purchase have on your retirement benefits? In the myAsga insurance portal, you can calculate a scenario online using your current data and submit your application directly. You will find access to the insurance portal and instructions on how to register at www.asga.ch/myasga.

- We are required to carry out certain checks each year before preparing a calculation.
- The purchase amount must be at least CHF 1,000.00.

☐ Pension fund

☐ Pension Foundation

1. Insured person

Last name		First name	
Social security number			
Date of birth	Gender	☐ M	☐ F
Street, no.	Postcode	Place	
Home telephone	Work telephone		
Mobile telephone	Email		

2. Employer

Last name
Member/contract no.

3. Relevant questions

Self-employed activity

Have you ever been self-employed since 1985 and contributed to a pillar 3a scheme? ☐ yes ☐ no

If so, please enter balance as of 31 December of the previous year CHF _____

Second pillar assets

Do you have second pillar assets outside Asga? Applies only to vested benefits accounts or vested benefits policies. ☐ yes ☐ no

If so, please enter balance as of 31 December of the previous year CHF _____



▼ Please pay particular attention to the following page.

Early withdrawal under home ownership scheme

Have you made an early withdrawal under the 2nd pillar for the promotion of home ownership?

☐ yes

☐ no

If so, please state date and amount withdrawn

Date _____

CHF _____

Did you repay some or all of the withdrawal?

☐ yes

☐ no

If so, please specify the date and amount of the repayment

Date _____

CHF _____

i Note

- ▶ A purchase is possible only once any early withdrawals made under the promotion of home ownership (WEF) of the 2nd pillar have been fully repaid.

Entry into Switzerland

Did you move to Switzerland from abroad after 1 January 2006?

☐ yes

☐ no

If so, please state date of entry

Date _____

If yes, please state the date of entry into the first Swiss occupational benefits institution under the 2nd pillar.

Date _____

Cross-border commuter

Are you a cross-border commuter?

☐ yes

☐ no

If yes, please state the date of entry into the first Swiss occupational benefits institution under the 2nd pillar.

Date _____

Withdrawal of retirement pension/lump-sum payment

Do you receive a retirement pension from another second pillar occupational benefits institution, or have you already had retirement capital paid out?

☐ yes

☐ no

 If yes, please enclose the pension fund settlement statement.

Remarks

i Notes

- ▶ The purchase is binding and irrevocable.
- ▶ The benefits resulting from purchases may not be withdrawn in the form of capital within the next three years. Before making your transfer, please check the permitted buy-in amount with the relevant tax authority.
- ▶ Asga declines all responsibility for tax treatment.

With my signature, I confirm the accuracy of the information provided and declare that I am the sole beneficial owner of the transferred purchase amount.

Place _____

Date _____

Signature of insured person _____



▶ Please send us this form filled out and signed to Asga, Postfach, 9001 St.Gallen.