

# Questionnaire for Calculating the Maximum Possible Purchase

Please complete in capital letters. Completely filled out forms will save you and us extra work.

☐ Pensionskasse (Pension fund) ☐ Vorsorgestiftung (Pension foundation) ☐ Dienstleistungen AG (Services)

## Legal notices on purchases

► We are obliged to arrange several clarifications before creating the calculation on an annual basis.

### 1. Insured person

Name	First name	
AHV no.	old AHV no. (if available)	
Birth date	Gender	<input type="checkbox"/> m <input type="checkbox"/> f
Street, no.	ZIP code	City
Phone private	Phone business	
Phone mobile	Email	

### 2. Employer

Name
Member/contract no.

### 3. Relevant questions

#### Self-employment

Have you been self-employed since 1985 and have you made provisions for pillar 3a?

☐ yes ☐ no

If yes, please state the balance as of 31.12. of the previous year.

CHF \_\_\_\_\_

#### Credit second Pillar

Do you have 2nd pillar savings capital available outside of the Asga?

Concerns only vested benefit accounts or vested benefit policies?

☐ yes ☐ no

If yes, please state the balance as of 31.12. of the previous year.

CHF \_\_\_\_\_



▼ Please pay particular attention to the following page.

### Advance withdrawal home-ownership

Have you received an advance withdrawal for home-ownership promotion in context of the second pillar?

☐ yes

☐ no

If yes, please state the date and amount of the advance withdrawal.

Date \_\_\_\_\_

CHF \_\_\_\_\_

Have you repaid the advance withdrawal partially or in total?

☐ yes

☐ no

If yes, please state the date and amount of repayment.

Date \_\_\_\_\_

CHF \_\_\_\_\_

#### Legal notices on purchases

- A purchase is only possible, once any advance withdrawals for home-ownership promotion (HOP) of the second pillar have been completely

### Entry into Switzerland

Have you been entering Switzerland from abroad since 1st January 2006?

☐ yes

☐ no

If yes, please state the date of entry.

Date \_\_\_\_\_

If yes, please indicate the date of entry into the first Swiss 2nd pillar pension fund?

Date \_\_\_\_\_

### Cross-border commuter

Are you a regular cross-border commuter?

☐ yes

☐ no

If yes, please indicate the date of entry into the first Swiss 2nd pillar pension fund?

Date \_\_\_\_\_

### Receipt of retirement pension / capital payout

Do you receive a pension from another 2nd pillar pension fund?

☐ yes

☐ no



If yes, please enclose the statement of the pension fund.

### Comments

#### Legal notices on purchases

- The benefits resulting from purchases must not be paid out as capital within the next 3 years. Please clarify the admissible purchase sum with your tax authority before arranging a wire transfer.

With my signature I confirm the correctness of the stated details and declare, that I am the only economic beneficiary of the transferred purchase.

Place \_\_\_\_\_

Date \_\_\_\_\_

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



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