

Pictet Individual Pension Foundation (3rd Pillar A)

Encouragement of home ownership

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

Pictet Individual Pension Foundation (3rd 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 (3rd 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 (3rd Pillar A) to carry out the necessary additional checks.

Date: _____

Signature of
account holder: _____

Date: _____

Signature of spouse/
registered partner: _____