

Pledge-Notification

I, the undersigned

Surname: _____	Given Name (s): _____
AHV-Number _____	Marital Status: <input type="checkbox"/> Single, divorced, widowed <input type="checkbox"/> Married, registered Partnership
Surname of Spouse: _____	Given name (s) of Spouse: _____

1. herewith notify you of the pledge in accordance with Article 331d OR:

1.1. ☐ the maximum amount I am entitled to on the day of a possible debt recovery action

1.2. ☐ of the amount in CHF _____ (fixed amount)

1.3 ☐ my future retirement benefits up to the amount in accordance with 1.1.

1.4 ☐ my future retirement benefits up to the amount in accordance with 1.2.

1.5. ☐ the debt recovery action as per first option of that which excludes the second option

1.6. ☐ of the amount in CHF _____ (fixed amount) and my future retirement benefits up to the same amount, whereby the debt recovery action as per first option excludes that of the second option

1.7. for the financing of home ownership, consisting of

☐ an apartment

☐ a single-family home

located in _____

township _____

description in the Land Register of _____

Cat. No. _____ Land Register sheet _____

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2. The pledging occurs in order to

2.1. ☐ Purchase residential property in the following form:

- | | |
|--|---|
| <input type="checkbox"/> Ownership | <input type="checkbox"/> Ownership jointly liable with my spouse |
| <input type="checkbox"/> Joint ownership | <input type="checkbox"/> Independent and permanent building lease |

2.2. ☐ Build residential property in the following form:

- | | |
|--|---|
| <input type="checkbox"/> Ownership | <input type="checkbox"/> Ownership jointly liable with my spouse |
| <input type="checkbox"/> Joint ownership | <input type="checkbox"/> Independent and permanent building lease |

2.3. ☐ Purchase shares of residential property:

- ☐ Share certificate of a housing cooperative
- ☐ Shares of a tenant-public limited company

3. I commit to the following:

3.1. ☐ to use the residential property as an owner-occupier

- | | |
|--|--|
| <input type="checkbox"/> at my residence | <input type="checkbox"/> at my usual place of residence as long as the
pledge exists. |
|--|--|

3.2. ☐ promptly deposit the share certificate at the Pension Fund in the event of a debt recovery action.

4. I have been informed in writing:

4.1. That the Pension Fund will obtain consent of the pledgee, before they:

- pay out the vested termination benefit in cash
- pay out a pledged pension benefit
- transfer a part of the vested termination benefit to the Pension Fund of the other spouse in the event of a divorce.

4.2. That the Fund notifies the pledgee of the description of the new Pension Fund in the event of a withdrawal and informs the pledgee of the existence of the pledged amount, the pledge object and its scope.

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5. I have acknowledged the consequences of a possible debt recovery action as follows:

5.1. that the pension benefits will be cut-back immediately;

5.2. that the pension benefits are liable to tax as is an anticipated withdrawal:

☐ As I reside in Switzerland, I am responsible for paying federal, cantonal and community taxes; the Fund will notify the Swiss Federal Tax Administration of the debt recovery action.

☐ As I reside abroad, the Fund will directly debit the withholding tax on the debt recovery action amount.

5.3. That I have the option of voluntarily repaying the debt recovery action amount to the Fund within the same grace period and under the same conditions as an anticipated withdrawal.

5.4. That in the event of a subsequent amortisation of the residential property, I commit to repay the returns of the debt recovery action within the same grace period and under the same conditions as an anticipated withdrawal, or that my beneficiaries shall repay the returns of a possible debt recovery action if pension benefits are not applicable at the time of my death.

5.5. That the Fund shall enter an amortisation restriction into the Land Register.

6. I am requesting you to please,

confirm the validity and scope of the pledge to the pledgee at the appropriate time and providing the pledge corresponds to the current legal and regulatory regulations.

Place and Date

Signature of Member

Place and Date

Signature of Spouse

(The signature of the spouse must be certified by a notary)

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Documents to be enclosed

- ☐ Copy of the bank contract pertaining to the pledging of the pension
- ☐ Most recent Land Register extract
- ☐ Abstract of the notary certificate regarding the purchase of the residential property (if you are not yet the owner)
- ☐ Memorandum of Understanding
- ☐ Sectioning index of rooms
- ☐ Regulations or statutes of joint-ownership
- ☐ Financing plan of property, including the schedules consolidation date (abstract of notary certificate, if available)
- ☐ Description of the building, name of architect
- ☐ Copy of the building permit
- ☐ Copy of the building loan contract
- ☐ Copy of the contract for work and labour
- ☐ Contractor Agreement
- ☐ Obligation that the residential property will be used as soon as possible (letter or abstract of the notary certificate)
- ☐ Name of the bank or financier that is willing to grant the balance of the building loan or subsequently guarantee the mortgage loan
- ☐ Sectioning plan of the joint-ownership between the various joint-owners, which enables the identification of their future share
- ☐ Verification of easement for the benefit of the builder
- ☐ Regulations or statutes of the housing-cooperative
- ☐ Brochure (or similar) that specifies the share prices
- ☐ Verification document regarding the existence of residential property that belongs to the assets of the cooperative or is currently still under construction
- ☐ Outline of contract regarding the purchase of share certificates
- ☐ Verification document that the pledging of the pension funds is associated with the purchase of the share certificates
- ☐ Statutes of the tenant public limited company
- ☐ Internal regulations of the tenant public limited company
- ☐ Brochure (or similar) that specifies the share price of the tenant public limited company
- ☐ Verification document pertaining to the existence of residential property that belongs to the assets of the tenant public limited company or is currently still under construction
- ☐ Outline of contract pertaining to the purchase of the shares
- ☐ Confirmation of residence
- ☐ Proof of residency
- ☐ Other documents:
- ☐
- ☐
- ☐