

**BAYER PENSIONS KASSE SCHWEIZ
PURCHASE****Reason for purchase** Purchase of benefits Purchase for early retirement**Personal data of the insured person**

Last name _____

First name _____

Address _____

Country, postal code, city _____

AHV / AVS Nr. _____

Date of birth / Sex _____

Phone no. / e-mail address _____

Declaration**1. Vested benefits held in a vested benefits account or policy** No Yes, please enclose an updated certificate**2. Self-employment in the past** No Yes, please enclose a confirmation of your 3A pillar assets**3. Withdrawal for home ownership** No Yes, date: _____

Amount in CHF: _____

4. Capital paid in case of a divorce No Yes, date: _____

Amount in CHF: _____

5. Have you received any benefits or are you receiving any benefits (capital or pension)? No Yes, please attach the pension or disability statement of the pension fund**6. Moved to Switzerland from abroad within the last 5 years** No Yes, date: _____

Only to be answered if your answer to question no 6 is Yes:

7. Is this your first Swiss pension fund ? Yes No, date _____

Please enclose statement of former pension fund

Information

The funds must come from a bank or post office account in the name of the insured person or from a joint account in the name of the insured person.

Purchase of regulatory benefits

The legal provisions provide for the following limitations:
(Art. 79b BVG, Art. 60 a - d BVV 2)

1. Benefits resulting from a purchase may not be paid out in the form of a lump sum before three years have elapsed (retirement capital, payment of a vested benefit in cash, advance withdrawal for the acquisition of home ownership). If a lump-sum payment is nevertheless made within three years of the purchase, the tax deduction obtained may be cancelled by the tax office.
2. Advance payments made in the context of the promotion of home ownership must be repaid before purchases can be made.
3. The maximum purchase amount is reduced by any vested benefits that have not been transferred and, if applicable, by any part of Pillar 3a assets resulting from a previous self-employed activity.
4. The annual purchase amount paid by persons arriving from abroad who have never been members of a pension fund in Switzerland may not exceed 20% of the insured salary for five years after joining the Swiss pension fund.
5. The value used to calculate the retirement benefits of insured persons in receipt of a pension must be deducted from the maximum purchase amount.

Funds transferred in the context of a divorce are not subject to the limitations of numbers 1 and 2.

Purchase of benefits for early retirement

The legal provisions provide for the following limitations:
(Art. 1b BVV 2)

1. Purchases of early retirement benefits are only possible as soon as the regulatory benefits have been fully purchased.
2. The regulatory benefit target may not be exceeded by more than 5%. If this limit is exceeded, the excess accrued benefits on the due date shall stay with the pension fund.

Taxation

The maximum purchase amount is calculated on the basis of the data provided by the insured person and the information available to the pension fund.

Any omissions or inaccuracies in the information provided may have tax implications. The insured person is solely responsible for this.

The tax deductibility of the purchases made is defined by the cantonal and federal tax provisions. The pension fund does not guarantee the deductibility of these amounts and accepts no liability in this respect.

Signature

Place, date:

Signature of insured person:

Note

By signing this document, the insured person confirms the information provided is correct and that he/she has read and understood the above information about the purchase and taxation.

If the e-mail address is provided, the insured authorises the sending of his documents by secure e-mail.