

Confirmation
to Pensionskasse Conzzeta

Re:
Buying into the occupational benefits institution

When an employee starts a new job and joins the occupational benefits institution of his new employer, he is required by law to transfer both the vested termination benefit from his former occupational benefits institution and any other pension assets held with 2nd pillar vested benefits institutions, i.e. he is obliged to **buy into** the pension fund of his new employer (Article 4(2^{bis}) FZG/LFLP). Since 1 January 2006, such vested benefits must be **included in the calculation of a member's maximum voluntary purchase limit** even if they are not covered by the transfer requirement, i.e. regardless of any change in job. For persons who were previously self-employed, a portion of the pension assets, if any, held in tied retirement savings schemes (pillar 3a) have to be taken into account (Article 60a BVV2/OPP2). Moreover, as of 1 January 2006, buying-in possibilities have been restricted for persons moving to Switzerland from abroad (Article 60b BVV2/OPP2).

In this connection, I hereby confirm that:

- I have no 2nd pillar vested benefits accounts or policies
- I have the following 2nd pillar vested benefits accounts and/or policies with other vested benefit institutions (please attach the relevant statements)

Balance/redemption value on 31.12.	Name and address of bank or insurer

To be answered only if you were previously self-employed

- I have no tied pillar 3a retirement savings accounts or policies
- I have the following tied pillar 3a retirement savings accounts or policies (please attach the relevant statements/ tax certificates)

Balance/redemption value on 31.12.	Name and address of bank or insurer

To be answered only if you have moved to Switzerland from abroad

- I have not moved to Switzerland from abroad in the last five years
- I moved to Switzerland from abroad on
- I was previously a member of a Swiss occupational benefits institution (please attach insurance certificate or statement of termination benefit)

Have you made any withdrawals to finance the purchase of a residential property for your own use which you have not yet repaid? yes no

Name: First name:

Address:

Place / Date:

Member's signature: