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Your Swiss Insurer

**Postal address**  
Helvetia Insurance  
P.O. Box 99  
8010 Zurich

## Promotion of home ownership

### Selection

This form is to be used only to order documents required for requesting an advance withdrawal or to indicate a pledge of funds from the occupational benefit scheme.

I would like to receive additional information or the necessary documents

- ☐ for an advance withdrawal of funds from the occupational benefit scheme and/or
- ☐ to pledge funds from the occupational benefit scheme
- ☐ for the transfer of an advance withdrawal of occupational benefit assets to a new residential property

### Employer

Company

Contract number

### Employee

Policy no.

Title

- ☐ Ms
- ☐ Mr

First name

Last name

Street

No.

Postcode

Place

Country

Date of birth

Marital status

E-Mail

Telephone

Are you receiving a full disability pension (full IV pension) from the Swiss disability insurance scheme (IV)?

- ☐ No
- ☐ Yes

**Note:** Persons who receive a full disability pension (full IV pension) from the Swiss disability insurance scheme (IV) cannot use their pension assets to finance home ownership.

## To purchase residential property

I intend

- ☐ To purchase a residential property
- ☐ To build a residential property
- ☐ To refurbish/renovate residential property
- ☐ To purchase part of a residential property (e.g. participation certificate in a housing cooperative)
- ☐ To pay back a mortgage loan

Planned advance withdrawal as of

Desired amount of advance withdrawal

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**Note:** For persons aged 50 or older, the maximum possible advance withdrawal is limited to the termination benefit at age 50 or half the termination benefit at the age when the advance withdrawal is taken (whichever amount is greater).

Have you already made an advance withdrawal?

- ☐ Yes
- ☐ No

Date of last advance withdrawal

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**Note:** Advance withdrawals are only possible once every five years.

Have you already made a pledge?

- ☐ Yes
- ☐ No

## Data protection

All personal data will be processed in accordance with the current legislation:

For compulsory occupational benefits, the data protection regulations of LOB (Art. 85a ff. LOB) apply. The provisions of the FADP apply in addition. The FADP applies to purely supplementary occupational benefits (for information e.g. identity and contact details of responsible persons, processing purposes, etc. please see [www.helvetia.ch/privacy](http://www.helvetia.ch/privacy)).