

# Documents to be provided for property located in Switzerland



CIEPP

Caisse Inter-Entreprises  
de Prévoyance Professionnelle

ZKBV - Zwischenbetriebliche Kasse für Berufliche Vorsorge  
CIPP - Cassa Interaziendale di Previdenza Professionale

The Fund reserves the right to require any other documents that may be necessary to establish an entitlement to an advance payment in the context of encouragement of home ownership.

## A1. PURCHASE OF YOUR PRIMARY RESIDENCE

- a) A "Request for benefits for the encouragement of Home ownership (EPL)" form, duly completed, dated and signed
- b) A copy of the identity document or passport
- c) A copy of the updated family record book or recent family certificate (for married or LPart insured persons)
- d) An individual certificate of civil status less than one month old (for single persons, divorced persons, LPart dissolution or widows)
- e) A "Undertaking of the insured person" form
- f) A complete notarized deed of sale or sales agreement, signed by both parties
- g) A notary's certificate stating:
  - the total price of the housing
  - the notion of "**owner**" or "**co-owner**" of the housing
  - his or her commitment to register the restriction of the right of disposal according to the LPP in the Land Register
  - his or her commitment to provide us with proof thereof (a copy of the registration)
  - his or her commitment to provide us with the final deed of sale
  - his or her commitment to reimburse the funds to the pension fund if the final deed is not signed
  - the **bank account no.** (IBAN), for making the advance payment
- h) A request to the Land Registry for a reference to the restriction of the right of disposal according to the LPP (established by the notary)

## A2. CONSTRUCTION OF YOUR PRIMARY RESIDENCE

- a) A "Request for benefits for the encouragement of Home ownership (EPL)" form, duly completed, dated and signed
- b) A copy of the identity document or passport
- c) A copy of the updated family record book or recent family certificate (for married or LPart insured persons)
- d) An individual certificate of civil status less than one month old (for single persons, divorced persons, LPart dissolution or widows)
- e) A complete copy of the notarized deed of sale
- f) A copy of the construction contract
- g) An extract from the Land Registry as soon as it is entered therein
- h) A copy of the firm and final building permit
- i) An "Undertaking of the insured person" form
- j) A request to the Land Registry for a reference to the restriction of the right of disposal according to the LPP (established by the notary)

### With a credit agreement

- k) A complete copy of the credit agreement
- l) A certificate from the credit institution confirming:
  - that the amount paid by our pension fund will be used **exclusively for the construction** of the property
  - that it **agrees** to release funds according to the progress of the work **and** on presentation of the invoices
  - that it **undertakes to refund our money** if the real property project does not go ahead
  - the bank account no. (IBAN) of the **credit institution, for making the advance payment**

### Without a credit agreement

- m) A final invoice to be submitted on completion of the structural work, approved by the insured person  
(N.B.: only one payment date possible for all invoices - maximum 3 invoices - and no advance payments or refunds possible)
- n) Bank account no. (IBAN) of the **builder**

#### Offices

Bulle	Rue Condémine 56	T 026 919 87 40
Fribourg	Rue de l'Hôpital 15	T 026 552 66 90
Neuchâtel	Av. du 1 <sup>er</sup> -Mars 18	T 032 727 37 00
Porrentruy	Ch. de la Perche 2	T 032 465 15 80

#### Administrative headquarters of the pension fund

Rue de Saint-Jean 67 – PO Box – 1211 Geneva 3  
T 058 715 31 11 – ciepp@fer-ge.ch – www.ciepp.ch

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## A3. AMORTIZATION OF THE MORTGAGE LOAN FOR THE PRIMARY RESIDENCE YOU OCCUPY

a) A "Request for benefits for the encouragement of Home ownership (EPL)" form, duly completed, dated and signed
b) A copy of the identity document or passport
c) A copy of the updated family record book or recent family certificate (for married or LPart insured persons)
d) An individual certificate of civil status less than one month old (for single persons, divorced persons, LPart dissolution or widows)
e) An extract from the Land Registry less than one month old
f) A certificate of residence issued by Town Hall less than one month ago
g) A complete copy of the notarized deed of sale
h) A complete copy of the credit agreement <b>and</b> the amortization table
i) A certificate from the bank that granted the loan, specifying: <ul style="list-style-type: none"> <li>– the net amount of principal <b>outstanding</b>, after the last payment, <b>excluding amortization interest</b></li> <li>– the name and address of the loan recipient</li> <li>– that the amount to be paid by the pension fund will be used exclusively for the repayment of the above-mentioned mortgage loan</li> <li>– the <b>bank account no.</b> (IBAN) of the credit institution, for making the advance payment</li> </ul>
j) A request to the Land Registry for a reference to the restriction of the right of disposal according to the LPP, signed by the insured owner

## A4. WORKS THAT ADD VALUE TO THE PROPERTY

(excluding the usual maintenance work or exterior fittings, garage, swimming pool, terrace, etc.)

a) A "Request for benefits for the encouragement of Home ownership (EPL)" form, duly completed, dated and signed
b) A copy of the identity document or passport
c) A copy of the updated family record book or recent family certificate (for married or LPart insured persons)
d) An individual certificate of civil status less than one month old (for single persons, divorced persons, LPart dissolution or widows)
e) A letter explaining the type of works planned and the reasons therefor
f) A complete copy of the notarized deed of sale
g) An extract from the Land Registry less than one month old
h) A copy of the firm and final building permit
i) A certificate of residence issued by Town Hall less than one month ago
j) Detailed quote(s)
k) A request to the Land Registry for <i>a reference to the restriction of the right of disposal according to the LPP</i> , signed by the insured owner
<b>With a credit agreement</b>
l) A complete copy of the credit agreement
m) A certificate from the bank confirming: <ul style="list-style-type: none"> <li>– that the amount paid by our pension fund will be used <b>exclusively for the construction of the property</b></li> <li>– that it agrees to release funds according to the progress of the work <b>and</b> on presentation of the invoices</li> <li>– that it <b>undertakes to refund our money</b> if the real property project does not go ahead</li> <li>– the bank account no. (IBAN) of the <b>credit institution</b></li> </ul>
<b>Without a credit agreement</b>
n) A final invoice to be submitted on completion of the works, approved by the insured person (N.B.: only one payment date possible for all invoices - maximum 3 invoices - and no advance payments or refunds possible)
o) Bank account no. (IBAN) of the <b>contractor</b>

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