



Application to refund the withholding tax on payments by pension funds domiciled in the canton of Bern

>>> to be filled in by the taxpayer

<input type="checkbox"/> Second pillar (pension fund)	<input type="checkbox"/> Lump sum
<input type="checkbox"/> Pillar 3a (restricted pension plan)	<input type="checkbox"/> Pension

Personal details

Surname		First name	
Date of birth		Nationality 1 ¹	
Marital status		Nationality 2 ¹	
Email address			

Home address abroad

Street/no.			
Postcode/Town		Country ²	

Payment details for the refund of withholding tax³

<input type="checkbox"/> Bank (name)		Subsidiary	
Address (bank)			
Account no. (IBAN)		BIC/SWIFT	
Account holder			
<input type="checkbox"/> Postal account (IBAN)		Account holder	

Representative (optional)

Name			
Address			
Postcode/Town		Canton	

Pension fund

Name			
Address			
Postcode/Town		Canton	

Pension gross⁴ (periodic)

CHF		Withholding tax ⁴	
From		to	

¹ All nationalities must be indicated.

² German cross-border commuters must submit a copy of their residence permit, if available.

³ Check the financial institution that applies.

⁴ Pension amount (gross) or withholding tax for the period for which the withholding tax refund is being claimed.

Lump sum gross (one-off)

CHF _____ Withholding tax⁴ _____
Date of payment _____

Last employer in Switzerland

Company _____
Address _____
Postcode/Town _____ Canton _____

Applicant's signature

Place, date _____

>>> to be filled in by the foreign tax authorities

The tax authority of the country of domicile certifies:

- that it is aware of the aforementioned payment
and
that the recipient of the payment is a resident as defined in the double taxation agreement with Switzerland.
- that the aforementioned payment has effectively been taxed if the recipient of the payment is a resident of one of the following countries⁵: Australia, China, Bulgaria, France⁶, Israel, Peru, Uruguay or Cyprus (enclose proof of taxation).
- that the following amount has effectively been transferred to or was withdrawn in the United Kingdom (GB), Ireland, Japan or South Korea if the recipient is a resident of one of those countries⁵
and
that the recipient is taxed only on the part of the income which was transferred or withdrawn there (taxation on remittance basis):

CHF _____

Stamp and signature of the foreign tax authority

Place, date _____

⁵ Underline country applicable.

⁶ French residents must additionally submit the calculation method of the actual taxation with the application.

Enclosures

Please enclose the following documents:

- Copy of the residence permit for German cross-border commuters _____
- Proof of taxation _____
- Copy of the payment slip in the case of lump-sum payments _____
- Copy of the pension statement in the case of pension payments _____
- _____

The completed form (two pages) and the enclosures must be signed and forwarded to the tax authority:
Steuerverwaltung des Kantons Bern, Zentrale Veranlagungsbereiche, Quellensteuer, Postfach, 3001 Bern