



HSB – där möjligheterna bor

## TRANSFER OF HSB'S BOSPARANDE

Danske Bank

### CUSTOMER DETAILS

Name	Social Security number
Department Address, Postal Code, and City	HSB compound
Email address	Telephone (daytime including area code)

I hereby transfer my **HSB Bospar savings** and the assets in the associated accounts to the following beneficiaries and I hereby assign Danske Bank to allocate my assets as stated below\*:

### RECIPIENT OF CASH AND CASH EQUIVALENTS AT HSB BOSPAR ACCOUNT AND HSB ISK ACCOUNT AND THE ASSOCIATED HSB BOSPARPOINTS

Social security number, Recipient 1	Name, recipient 1	Percent*
Social security number, Recipient 2	Name, recipient 2	Percent*
Social security number, Recipient 3	Name, recipient 3	Percent*

\*the percentages may be adjusted by HSB to allow the transfer of even number of savings points.

### RECIPIENTS OF FUNDS AT HSB DEPOT AND ASSOCIATED BOSPARPOINTS

Social Security number, recipient	Name recipient	Receiving HSB Depot Account number

### RECIPIENTS OF FUNDS AT HSB ISK DEPOT AND ASSOCIATED BOSPARPOINTS

Social Security number, recipient	Name recipient	Receiving HSB Depot Account number

**NOTE: Each recipient of this transfer requires corresponding savings products in Danske Bank before the transfer can be made**

I confirm that my HSB Bospar points at the time of this transfer are correct and that the relationship between me and the recipient(s) complies with HSB's regulations

Transferor	Location and date	Signature, the transferor

### OTHER

It is possible to provide a free text message to HSB or Danske Bank, for example, if the savings account is not to be terminated or if any surplus is desired to be retained on the transferor.

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If applicable, estate inventory deed shall be attached to the transfer documents.

### FILLED IN BY HSB

Authentication	Type of identification <input type="checkbox"/> Driver's license <input type="checkbox"/> Sis-marked ID card <input type="checkbox"/> Swedish EU-passport <input type="checkbox"/> National ID card Number: _____ <input type="checkbox"/> Other document, specify type _____
	Administrator Name/HSB association/Telephone number

### HSB'S NOTES

<input type="checkbox"/> The relationship between transferor and recipient(s) has been checked against _____ <input type="checkbox"/> Recipient(s) have an active membership in HSB and a HSB Bospar account <input type="checkbox"/> Recipient(s) currently has zero in Bospar point balance <input type="checkbox"/> HSB approves the transfer in accordance with current membership- and transfer regulations		
Location date	Name of the resident representative	HSB compound



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HSB's Bospar savings and associated Bospar points can be transferred to a spouse, cohabitant, registered partner, parent, child, sibling or grandchild. It can also be transferred to a spouse/cohabitant/registered partner's children or through estate inventory deed, inheritance or will of testament. Transfer from minors is not permitted.

**As a part of the transfer, a copy of a birth certificate confirming the relationship between the transferor and the recipient shall be attached to the transfer documents. If the relationship extends over several steps, birth certificates should be provided for all steps.**

#### **Digital account opening for recipients**

The recipient(s) of the transfer must have their own HSB Bospar account before the transfer can be completed. A HSB Bospar account is opened at [hsb.se/bospara](https://hsb.se/bospara). All the information requested in the form should be filled out. Specify the percentage to be transferred to each recipient. For more than 3 recipients, the form must be printed in multiple copies. If the HSB Bospar points does not equal the percentage split, the first recipient will automatically receive the most savings points, as a Bospar point cannot be shared. In the event of transfer, all the saving details and the balance are allocated according to the percentages stated on the form.

#### **Any saving points of the recipient will be reset**

It is not possible to merge Bospar points from several Bosparare to one recipient. If a recipient already has a Bospar account with points/financial means, it must be transferred to another person before the transfer can take place. If you do not wish to transfer your existing capital within your Bosparande, you can notify in writing on the form that the current balance is to be retained, that means that the points are reset but the economic balance is kept as surplus. The recipient can then receive the transferor's Bospar points.

#### **Estate inventory deed, inheritance or will of testament**

In connection with estate inventory deed, inheritance or will of testament, the transfer should be supplemented by a certified copy of the estate inventory deed registered at the Swedish Tax Agency, where it is clear who is the owner of the estate. If there are several partners in the estate, authorization from all persons is required for approval of the transfer. If there is a will of testament, a certified copy of this should be attached. The transfer must always be submitted in person, if there is no power of attorney, all the beneficiaries shall be present for verification of identity and all shall have signed the transfer documents. In cases where a power of attorney is attached, it is important that it is clear from the power of attorney that it refers to the transfer of the Bosparande.

#### **Transferable savings forms**

The savings placed on a HSB Bospar account may be transferred in full to one, or shared among several recipients. If you have your savings in a HSB fixed interest rate account (Fastråntekonto), the financial means must be redeemed and the balance transferred to HSB Bospar Account before transfer to the recipient(s) can take place. Transfer of mutual funds requires that the recipient also must have a HSB Depot and/or HSB ISK before the transfer can take place. Fill out the recipient's details in the form.

In the event of sale of mutual funds, the financial means must first be transferred to the transferor's HSB Bospar account before it is transferred to the recipient's HSB Bospar account. Once the transfer is completed, the recipient may choose to transfer their savings to any savings product available in the HSB's Bospar offer. Any tax arising from redemption or sale will be charged the transferor. HSB ISK complies with the general tax rules for investment savings accounts.

#### **Bospar accounts and related automatic transfers is terminated in connection with transfer**

In the field "other", you can provide a notification if special requests exist, for example if the transferor wishes to retain his/her Bospar account in order to start saving again or if any surplus savings are desired to be retained by the transferor.

#### **Alternating transfer between two persons of age**

In case of transfer where two adults wish to exchange Bospar saving with each other, two transfer forms must be filled out.

#### **Mandatory identification check**

The transferor should go to an HSB compound to perform a verification of identity and at the same time hand in the transfer form personally.

#### **Processing time**

The processing time for transfer normally varies between 1-4 weeks.

When the transfer is completed in Danske Bank, a confirmation will be sent to the transferor and the recipient. It may take a few days for the transfer to be completed at HSB. Therefore, always check the Bospar points in My HSB before searching for an apartment.