

Beneficiary declaration

Employer	Contract No.
Surname	First name
Street	Postcode/Town
Date of birth	Material status/Date
E-Mail	Phone

Excerpt from the Pension Fund Regulations (Article 30)

If an actively insured person or a disability pension recipient dies before retirement, the survivors are entitled to a lump-sum death benefit, irrespective of inheritance law. The amount of the lump-sum is defined in the regulations. The surviving dependants are entitled to benefits in the following order of priority, whereby, unless the insured person has specified otherwise, the preceding group excludes the following group from entitlement to benefits:

- Group a: the spouse and the insured person's children eligible for an orphan's pension
- Group b: the persons who have been supported to a considerable extent by the insured person during the last 5 years up to his/her death; and the person who satisfies the conditions stipulated in the regulations for a life partner's pension (Art. 26).
Persons in this group are only eligible if they were notified to the Foundation in writing by the insured person during their lifetime as being entitled to the lump-sum death benefit.
- Group c: the children of the deceased (excluding stepchildren) who are not entitled to an orphan's pension
- Group d: the parents
- Group e: the siblings (incl. half-siblings, excl. step-siblings)

The insured person may alter the ranking of groups c, d and e or combine them by making a different declaration of beneficiary. The insured person may likewise subordinate beneficiaries in group a to the other groups or combine them.

The death benefit is generally divided equally among the beneficiaries. However, the insured person can determine the distribution individually by means of a declaration of beneficiary.

Persons outside the designated groups are not eligible for benefits.

Remark

In any case any payment to the beneficiary or beneficiaries shall be determined by the circumstances and the regulations in place at the time of the death of the insured person (subject to mandatory legal provisions). It is only on the occurrence of an insured event that the foundation is able to verify whether or not the designated beneficiaries fulfil the conditions for entitlement to benefits. The beneficiaries are responsible for furnishing proof that they meet the eligibility requirements.

This beneficiary declaration must be lodged with the foundation by the insured person during their lifetime. In the event of a switch to a new employer or a new pension fund the latter's pension regulations shall apply accordingly. The declaration supersedes all previous beneficiary declarations issued as part of the occupational pension scheme.

Beneficiary declaration

In the knowledge of Article 30 of the Pension Fund and Organisational Regulations the insured person specifies the following individual beneficiary declaration in deviation from the order/allocation provided for under the terms of the Regulations:

Group a: the spouse and the insured person's children eligible for an orphan's pension

Eligible children for orphan's benefits are under 18 years of age or, if in education, between 18 and 25 years old.

Surname and first name	Date of birth	Share in %
<hr/>	<hr/>	<hr/>
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Combination

- ☐ I have children, am married, and would like all my children (including those who are not entitled to an orphan's pension) to benefit from the shares I have specified. I am therefore combining "group a" and "group c."

Group b: the life partner and the persons who have been supported to a considerable extent by the insured person during the last 5 years up to his/her death

As long as the insured person is still married, no life partner can be named as beneficiary.

Surname and first name	Date of birth	Share in %
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Combination

- ☐ I would like to combine persons in "group b" with persons in "group a" who are entitled to an orphan's pension.

Group c: the children of the deceased (excluding stepchildren) who are not entitled to an orphan's pension

Children who are not eligible for orphan's pensions are those who have reached the age of majority (except those in ongoing education up to the age of 25, see "Group a").

Surname and first name	Date of birth	Share in %
_____	_____	_____
_____	_____	_____
_____	_____	_____

Combination/exclusion

- ☐ I would like to combine people from "group c" with the group: _____
- ☐ I would like to exclude people from "group c."

Group d: the parents

Surname and first name	Date of birth	Share in %
_____	_____	_____
_____	_____	_____

Combination/exclusion

- ☐ I would like to combine people from "group d" with the group: _____
- ☐ I would like to exclude people from "group d."

Group e: the siblings (incl. half-siblings, excl. step-siblings)

Surname and first name	Date of birth	Share in %
_____	_____	_____
_____	_____	_____
_____	_____	_____

Combination/exclusion

- ☐ I would like to combine people from "group e" with the group: _____
- ☐ I would like to exclude people from "group e."

Remark

The desired shares of the beneficiaries must add up to 100 % in total.

Date

Signature of insured person