

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 following survivors are entitled in below order:

Beneficiary category I

- Group a: the spouse
- Group b: the insured person's children eligible for an orphan's pension
- Group c: those persons who were provided for to a significant degree by the insured person over the course of the past five years prior to the latter's death; or the person who lived with the deceased person in a consensual union without interruption over the past five years up to the latter's death and shared a common domicile; or the person who is responsible for providing financial support for one or more children. Persons in this group are eligible only if they were made known in writing to the foundation by the insured person during the latter's lifetime and do not draw a spouse's or cohabitant's pension from a previous marriage or cohabitation.

Beneficiary category II (in the absence of beneficiaries in beneficiary category I)

- Group d: the remaining children who do not belong to group b
- Group e: the parents
- Group f: the siblings (incl. half brothers and sisters, excl. stepbrothers and stepsisters)

The insured person may individually determine the ranking of the groups and/or the proportional distribution among the persons specified therein within beneficiary category I or II. It is not permitted to mix the beneficiary categories. Persons outside the designated groups can't be benefited.

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:

Beneficiary category I

Reference/relationship	Surname and first name	Date of birth	Beneficiary share %
Spouse			
Children eligible for an orphan's pension (under 18 or 25 years in school or training)			
Cohabitant			
Persons provided with significant support			
Persons responsible for providing financial support for one or more joint children:			

Beneficiary category II (in the absence of beneficiaries in beneficiary category I)

Reference/relationship	Surname and first name	Date of birth	Beneficiary share %
remaining children (not eligible for an orphan's pension)			
Parents			
Siblings			

Date

Signature of insured person