

Amendment to the Order of Beneficiaries

Employer

Company

Contract number

Employee

Policy no.

Title

Ms

Mr

First name

Last name

Street

No.

Postcode

Place

Country

Date of birth

Marital status

E-mail

Change in the order of beneficiaries

a)

Spouse or registered partner

First name

Last name

Date of birth

Part in %

Life partner

First name

Last name

Date of birth

Part in %

- Children, stepchildren and foster children until they reach age 18 or for as long as they are receiving an education/training until a maximum of age 25

First name	Last name	Date of birth	Part in %
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

- Persons who have to pay for the maintenance of one or more common children

First name	Last name	Date of birth	Part in %
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

- Significantly supported persons

First name	Last name	Date of birth	Part in %
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

b) The following persons listed below can only be designated as beneficiaries if none of the persons listed under a) exist

- Children after the age of 18 or those undergoing training after the age of 25 (step-children and foster children are excluded)

First name	Last name	Date of birth	Part in %
_____	_____	_____	_____

First name	Last name	Date of birth	Part in %
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Siblings

First name	Last name	Date of birth	Part in %
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Parents

First name	Last name	Date of birth	Part in %
_____	_____	_____	_____
_____	_____	_____	_____

c) The following persons listed below can only be designated as beneficiaries if none of the persons listed under a) or b) exist

Other legal heirs

Note: You can only grant a benefit to other legal heirs if you have neither living siblings nor living parents. The other legal heirs can only benefit to the amount of 50% of existing retirement assets. Grandparents and their descendants are considered to be other legal heirs within the meaning of the regulations. The community cannot be favoured.

First name	Last name	Date of birth	Part in %
_____	_____	_____	_____
_____	_____	_____	_____

Note: If, in the event of death of the insured person, a beneficiary under the regulations asserts a claim, the Foundation cannot guarantee compliance with the desired regulation. In any case, the circumstances and the pension fund regulations in force at the time of death are decisive. We recommend a periodic review of the order of beneficiaries that you have submitted. This change to the order of beneficiaries replaces all the amendments submitted so far.

Comments

Place and date

Signature of the insured person

Good to know

Under categories a) – c) we have listed all persons who may be the beneficiary of a survivor's benefit; other persons will not be considered. Furthermore, only those persons in the same category may be named beneficiaries. There are additional restrictions for those receiving a spouse's pension and for divorced spouses. You should therefore read the applicable regulations.

Data protection

All personal data will be processed in accordance with the current legislation:

For compulsory occupational benefits, the data protection regulations of LOB (Art. 85a ff. LOB) apply. The provisions of the FADP apply in addition. The FADP applies to purely supplementary occupational benefits (for information e.g. identity and contact details of responsible persons, processing purposes, etc. please see www.helvetia.ch/privacy).