

simple. clear. helvetia.
Your Swiss Insurer

Postal address
Helvetia Insurance
P.O. Box 99
8010 Zurich

Death

Insured person

Policy no.

Title

☐

Ms

☐

Mr

First name

Last name

Street

No.

Postcode

Place

Country

Date of birth

Marital status

since, date

E-mail

Date of death

Surviving dependants

Note: Spouses, registered partners as well as minor children and those children of the insured who are under the age of 25 and still at school or undergoing professional training are preferred beneficiaries pursuant to the Order of Precedence for Beneficiaries.

Note: Precedence for Beneficiaries further includes as beneficiaries any natural persons supported by the insured to a considerable extent; or the person with whom the insured lived together without interruption for the last five years before his/her death or who is responsible for supporting one or more children; the children of the deceased who do not satisfy the requirements of Art. 20 LOB, the parents or the siblings; as well as the other legal heirs, to the exclusion of the public body.

☐

Surviving spouse/registered partner

First name

Last name

Street

No.

Postcode

Place

☐ Partner

First name

Last name

Street

No.

Postcode

Place

☐ Children of the insured

Child

First name

Last name

Street

No.

Postcode

Place

Date of birth

Child

First name

Last name

Street

No.

Postcode

Place

Date of birth

Child

First name

Last name

Street

No.

Postcode

Place

Date of birth

☐ Others entitled to claim according to the benefit regulations.

Other entitled person

First name

Last name

Street

No.

Postcode

Place

Relationship with the deceased

- ☐ Child with no entitlement to benefits
- ☐ Siblings
- ☐ Parent
- ☐ Person receiving substantial support
- ☐ Other legal heirs

Other entitled person

First name

Last name

Street

No.

Postcode

Place

Relationship with the deceased

- ☐ Child with no entitlement to benefits
- ☐ Siblings
- ☐ Parent
- ☐ Person receiving substantial support
- ☐ Other legal heirs

Documents

To simplify matters, please attach the documents you already have.

Documents required:

- Official death certificate
- List of heirs
- Family record document or certificate of the registered partnership

Additional documents, if an entitlement shall be considered:

- for persons supported by the insured to a considerable extent
- for a person with whom the insured lived together without interruption for the last five years before his/her death
- for a person who is responsible for supporting one or more children

- For adult children under the age of 25 and still at school or undergoing professional training (see above): certificate of the educational institution

Documents attached:

Contact person

Note: This Notification of Death serves the Foundation exclusively for information purposes. The Foundation reserves the right to demand additional information which may serve to identify the beneficiaries. Once the right to benefit is established, the Foundation will request the necessary address details for payment from the beneficiaries.

The reglementary Order of Precedence for Beneficiaries serves as a basis to determine the right to benefit in conjunction with any requests for changes to or clarifications of the Order of Precedence for Beneficiaries as supplied by the insured him / herself.

First name

Last name

Street

No.

Postcode

Place

E-mail:

Telephone no.

Summary

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).