

Change in the order of beneficiaries

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

Change in the order of beneficiaries

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.

The regulations generally provide the following order of beneficiaries

The following persons are deemed to be beneficiaries:

a) at maturity the insured person;

b) if the insured person should die before the retirement benefit falls due, the following shall be deemed beneficiaries in the following order:

1. The survivors in accordance with Art.19, 19a and 20 LOB;
2. Natural persons who were supported by the insured person to a considerable extent, or the person with whom the insured person lived together without interruption for the last five years before his /her death or who is responsible for the maintenance of one or more common children;
3. The children of the deceased who do not fulfil the requirements of Art. 20 LOB, in the absence of whom the parents or the siblings, taking into account the statutory inheritance laws;
4. The other legal heirs to the exclusion of the public body.

I would like the following specification/changes to be made to the order of beneficiaries (with explanation):

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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).

Place and date

Signature of the insured person
