



Notification regarding nomination of beneficiaries for lump-sum death benefits

Information about contract and insured person

Name of employer or foundation <input type="text"/>	Contract no. <input type="text" value="/"/>
Last name of insured person <input type="text"/>	First name <input type="text"/>
Street/road, no. <input type="text"/>	ZIP code, town/city etc. <input type="text"/>
Date of birth <input type="text"/> <input type="text"/> <input type="text"/> Day Month Year	Marital status <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed <input type="checkbox"/> In a registered partnership <input type="checkbox"/> Dissolved partnership

Beneficiary

Last name <input type="text"/>	First name <input type="text"/>
Street/road, no. <input type="text"/>	ZIP code, town/city etc. <input type="text"/>
Date of birth <input type="text"/> <input type="text"/> <input type="text"/> Day Month Year	Marital status <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed <input type="checkbox"/> In a registered partnership <input type="checkbox"/> Dissolved partnership

Reasons for nomination of beneficiaries (see Annexe)

- I live with the beneficiary in a marriage-like relationship.
- In case of my death, the beneficiary must provide for the maintenance of one or more of our common children.
- I provide substantial support for the beneficiary. The precise reasons are stated below:
- Precise designation of beneficiary within a group of persons as per letters b-i of the regulations as follows, with reasons:
- Change in order of beneficiaries as per letters c-i of the regulations, with reasons:

Last Name / First Name / Street/road, no. / ZIP code, town/city etc. / Date of birth / Place of citizenship / Reasons

Place <input type="text"/>	Date <input type="text"/> <input type="text"/> <input type="text"/> Day Month Year	Signature of the insured person <input type="text"/>
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Acknowledgement by the Fund Board

The Administration Committee has taken note of the requested order of beneficiaries.

Place <input type="text"/>	Date <input type="text"/> <input type="text"/> <input type="text"/> Day Month Year	The Administration Committee (employees' and employer's representatives) <input type="text"/>
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Any such payment to the beneficiary is in any case governed by the circumstances at the time of the insured person's death and the general legal provisions applicable at such time.

Annexe to the notification regarding nomination of beneficiaries for lump-sum death benefits

The regulations usually stipulate the following order of beneficiaries:

Regardless of the law of succession, the following persons shall be entitled to the lump-sum death benefit:

- a. the surviving spouse, if living, otherwise
- b. eligible children, if living, otherwise
- c. other natural persons who were largely supported* by the deceased insured person, or the person who had lived continually with the insured in the same household for the five years prior to his/her death in a marriage-like relationship or who in his/her absence is largely responsible for supporting one or more of their common children, otherwise
- d. the remaining children, in his/her absence, otherwise
- e. the parents in his/her absence, otherwise
- f. the siblings in his/her absence, otherwise
- g. the grandchildren in his/her absence, otherwise
- h. the siblings' children in his/her absence, otherwise
- i. other legal successors (excluding the public domain), entitled to half of the lump-sum death benefit, but not more than 50% of the available retirement savings.

In justified cases, and if better suited to the purpose of providing a pension, the insured person may alter the order of beneficiaries under clauses c to i*. If the insured person wishes to take advantage of this option, he/she must inform the Administration Committee in writing for the attention of the Foundation and must provide an explanation. Following consultation with the Foundation, the Administration Committee shall decide on any change to the statutory order of beneficiaries.

In justified cases, and if better suited to the purpose of providing a pension, the insured person may also draw up a written agreement with the Administration Committee following consultation with the Foundation on which persons within a group are to be beneficiaries and to what extent. In the absence of such an agreement and in the event that there are several beneficiaries within one group, the Administration Committee shall distribute the available death benefits in equal amounts.

As per clause c, beneficiaries will only be included in the distribution if the Foundation is informed of the existence of a rightful claimant as per clause c by no later than when the lump-sum death benefit is paid out. Failure to provide this information to the proper office will result in a loss of entitlement to the lump-sum death benefit.

In any case, any payments made to beneficiaries shall be governed by the circumstances at the time of the insured person's death.

Subject to any extended coverage, any beneficiary designations submitted by the insured person are only valid until the insured person leaves the pension plan.

- *) In order to effectively nominate the person receiving substantial support (as per letter c) as a beneficiary, previous court rulings impose the following conditions, among others, which must be cumulatively satisfied at the time of the insured person's death:
- The beneficiary must be economically dependent on the insured person. Said beneficiary must have been substantially supported at the time of death and in the preceding year. This dependency may usually be assumed if the insured person provided more than half of the maintenance for the supported person.
 - The support must have been provided regularly over a period of at least 5 years.

The burden of proof of the circumstances constituting the basis for claims (e.g. uninterrupted marriage-like relationship for five years, substantial support) lies with the person claiming the benefits. The foundation's assessment as to whether such a situation exists depends on the circumstances at the time of death of the insured person. The legal framework conditions prevailing at the time of death of the insured person are authoritative.