

Change in the Order of Beneficiaries

Client

Client number	Plan number
First name	Surname
Marital status	Street, number
Postcode	Town
Date of birth	Social security number
Telephone number	E-mail

In the event of their dying, the Client herewith specifies the beneficiaries and their entitlements in accordance with the provisions of the law. In so doing, Article 2 of the Ordinance on Tax Relief on Contributions to Recognised Pension Schemes (BVV/OPO 3) of 13 November 1985 and the currently valid provisions of the pension regulations of the Independent Pension Foundation 3a Zurich, in particular, must be observed.

Order of Beneficiaries in accordance with pension regulations

The Client is the beneficiary in the event of their survival. After the Client's death, the following persons, in descending order, are beneficiaries:

Group	Beneficiaries	Change in benefit
1	The surviving spouse or the surviving registered partner.	Number 1 may not be amended.
2	The direct descendants and individuals who have received significant support from the Client or the person who cohabited with them continuously for the last five years preceding their death or is required to pay for the maintenance of one or more joint children.	Do you wish to specify the beneficiaries in number 2 and define their entitlements more specifically? Yes (please provide more details below) No
3*	The parents.	Do you wish to amend the order of numbers 3 to 5? Yes (please provide more details below) No
4*	The siblings.	
5*	The other heirs.	

* If numbers 1 and 2 do not apply, the order of numbers 3 to 5 can be chosen freely. Number 5 also requires the other heirs to be mentioned in the Client's will.

Designation of beneficiaries

I assert the right to determine the beneficiaries from group 2 or to change the order of beneficiaries from groups 3 to 5:

Group	First name	
	Surname	
	Address	
	Date of birth	
	Degree of relationship/connection	
	Share in %	
Group	First name	
	Surname	
	Address	
	Date of birth	
	Degree of relationship/connection	
	Share in %	
Group	First name	
	Surname	
	Address	
	Date of birth	
	Degree of relationship/connection	
	Share in %	

The Order of Beneficiaries listed above is solely effective in law for assets in the 3a pension account with the Independent Pension Foundation 3a Zurich.

The Client agrees to provide notification of all changes, such a change to their marital status, which could affect entitlements to benefits.

With this declaration, the Client revokes any previous changes to the Order of Beneficiaries.

To ensure that entitlements can be claimed in the event of the Client's death, the Independent Pension Foundation 3a Zurich may ask for additional documents, such as the death certificate, will, certificate of inheritance, family register, confirmation of residence, tenancy agreement etc. at this time. The validity of the Order of Beneficiaries depends on the situation and the legal position at the time of death.

Place	Date	Signature of the Client

Please send the form to:

Sending address:

Sending address:

Use this cover sheet to forward the documents in a window envelope.