

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, Art. 15 of the Vested Benefits Ordinance of 3 October 1994 and the currently valid provisions of the pension regulations of the Independent Vested Benefits Foundation Schwyz, 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 survivors according to Art. 19 (surviving spouse), Art. 19a (surviving registered partner) and Art. 20 (children entitled to an orphan's pension) of the Occupational Pensions Act (BVG/OPA).	The rights of beneficiaries in a group can be defined more specifically. People in group 2 can be added to the people in group 1.
2	Other 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.	
3	The children of the deceased who do not meet the requirements of Art. 20 of the Occupational Pensions Act (BVG/OPA).	If numbers 1 and 2 do not apply, the order of numbers 3 to 5 can be chosen freely.
4	The parents.	
5	The siblings.	
6	The other legal heirs, to the exclusion of the community.	

Designation of beneficiaries

I assert the right to specify the claims of beneficiaries in more detail as follows and/or to expand the group of persons:

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 with the Independent Vested Benefits Foundation Schwyz. 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 Vested Benefits Foundation Schwyz 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.