

Application to Withdraw the Lump Sum Payable on Death

Pension account number(s): _____

Insured person

Mr. Ms.

Social security number:

Last name:

First name:

Street/No.:

Postcode/Town/Country:

Date of birth (dd/mm/yyyy):

Civil status:

Applicant

Mr. Ms.

Relationship to the insured person:

Last name:

First name:

Street/No.:

Postcode/Town/Country:

Date of birth (dd/mm/yyyy):

Civil status:

This form constitutes a part of the regulations for the retirement savings account 3a. The applicant requests that Rendita Pension Foundation 3a pay out the lump sum on death in accordance with article 9 of the regulations. Each beneficiary must submit a separate form.

Please enclose copies of the following documents (if not already submitted)

- Copy of death certificate
- Copy of official list of heirs (statutory line of succession)
- Copy of proof of the deceased person's registered marital status
- Copy of applicant's passport/ID

The Foundation reserves the right to conduct further inquiries and request additional documents.

Payment order

The amount due must be transferred to the following bank or postal account of the eligible claimant:

IBAN/Account no.:

Account holder:

Name of bank:

Bank location:

The Pension Foundation 3a cannot establish whether eligible persons as defined in article 9 of the regulations exist for the pension account and whether one or more persons exist who

- received support from the insured person to a significant degree;
- shared a household with the insured person without interruption during the last five years up to the insured person's death (civil partner);
- are responsible for supporting one or more joint children.

The applicant hereby undertakes to indemnify the Pension Foundation 3a in full if the latter is obliged at a later date to pay benefits to other eligible claimants who, in accordance with the provisions of article 9 of the regulations, take precedent over the applicant. In such a case, several eligible claimants are jointly and severally liable vis-à-vis the Pension Foundation 3a.

The applicant is aware that the payment precludes any further claims against the Pensions Foundation 3a and that the capital is subject to tax.

If the pension capital is invested in securities, the corresponding holdings/units will be sold as soon as the Foundation has been notified of the insured person's death through submission of an official document from a registry of births, marriages and deaths.

Place/Date:

Signature of applicant:

X

General note

Pension capital does not form part of a deceased's estate.

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