

## Change in Order of Beneficiaries

**Pension benefits account number(s):** \_\_\_\_\_

Mr.  Ms. (hereinafter the "account holder")

Social security number:

Last name:

First name:

Street/No.:

Postcode/Town/Country:

Date of birth (dd/mm/yyyy):

Civil status:

In the event of my death, I hereby nominate the following beneficiaries and define their entitlement in the following order under Article 9 of the Regulations Governing 3a Pension Accounts:

Category a) and b)

- a) the surviving spouse
- b) the direct descendants and any natural persons who were supported to a considerable extent by the account holder, or the person with whom the account holder lived in a domestic partnership for the last five years prior to death without interruption or who is responsible for the maintenance of one or more joint children.

The account holder has the right to change the order of beneficiaries under letters c), d) and e) and to define their entitlement in more precise terms.

Last name, First name	Date of birth	Address	Relationship to account holder	Quote %
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Category c), d) and e)

- c) the parents
- d) the siblings
- e) the remaining heirs

The account holder has the right to change the order of beneficiaries under letters c), d) and e) and to define their entitlement in more precise terms.

Last name, First name	Date of birth	Address	Relationship to account holder	Quote %
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**Total 100%**

The foundation may refuse to pay out if the account holder's death was caused deliberately by the beneficiary. In this case, the benefits are due instead to the other beneficiaries in the same category or, if there are none, to the beneficiaries in the next category.

**Exemplar for the Foundation**

Under the revised inheritance law which came into effect on January 1, 2023, the capital in your 3a pension account will count for the calculation of the compulsory portions for the account holder's legal succession, but it does not form part of the estate. The beneficiaries now acquire entitlement from Pillar 3a in their own right. This entitlement is subject to a reduction if the spouse's or children's compulsory portions are infringed. This should be noted, for example, if you would like to make your life partner a beneficiary. We therefore recommend that you also set out your beneficiaries in a last will and testament at the same time.

This individual order of beneficiaries remains valid until revoked in writing or replaced by a new individual order of beneficiaries.

**Please note**

Final approval of the requested change can only be granted when a claim arises. This approval must comply with regulatory and statutory provisions applicable at that time.

Place/Date

Signature of account holder

**X**