

Amendment to beneficiary clause

Client number: _____

Policyholder:

First name, last name _____

Street, no. _____

Postcode, place _____

Date of birth _____

Marital status _____

Social insurance no. (AHV)

7 5 6 . . .

Telephone no. (for queries) _____

E-mail address _____

In the event of his/her death, the policyholder hereby determines – insofar as legally admissible – the beneficiaries and their entitlements.

Particular attention must be paid to Art. 15 of the Ordinance on Vested Benefits of 3 October 1994 and Art. 10 of the regulations of the Vested Benefits Foundation Swiss Life.

The following persons are eligible as beneficiaries:

The insured person upon survival; in the event of their death in the following order:

Group	Beneficiaries	Change of beneficiary designation
1	The survivors in accordance with the BVG (spouse/registered partner, children up to the age of 18 or 25 (if still in education))	The entitlements of beneficiaries within a group may be specified in more detail. The circle of persons of Group 1 can be expanded with persons of Group 2.
2	Natural persons who were to a large extent financially dependent on the policyholder, or a person who had cohabited with the policyholder in a continuous marriage-like relationship in the five years prior to the latter's death, or must support one or more children from the relationship.	
3	Children who do not fulfil the conditions in accordance with Art. 20 of the BVG, the parents and siblings.	The entitlements of beneficiaries within Group 3 may be specified in more detail. (Changes in the order of Groups 3 and 4 are not possible.)
4	For other legal heirs, excluding the community.	



In the event of death, I determine the beneficiaries and their entitlements within the framework of the legal provisions (see page 1) as follows (detailed information on the beneficiaries and definition of the percentage entitlement):

Group	Last name and first name	Date of birth	Address	Degree of kinship or relationship	Ratio in %
1					
2					
3					
4					

The above beneficiary regulations apply exclusively to vested benefit. By submitting this declaration, the policyholder revokes any previous changes to the beneficiary regulations. In the event of the policyholder's death, the Vested Benefits Foundation Swiss Life may request other documents to review the entitlements, such as death certificate, will, certificate of inheritance, family book, confirmation of residence, lease, etc. The validity of the beneficiary regulations depends on the situation and legal position at the time of the death.

The policyholder confirms that he/she has drawn the attention of the persons designated by him/her as beneficiaries to the data protection information below.

Place, date

Signature of policyholder

Please send to the Vested Benefits Foundation Swiss Life

All information on the processing of personal data and the processing purposes involved can be found in the **data protection consent form**, the latest version of which is available at any time at www.swisslife-wealth.ch/en/dse-fz3a or at the following address: Vested Benefits Foundation Swiss Life, c/o Swiss Life Wealth Management Ltd, Service Center, General-Guisan-Quai 40, P.O. Box, 8022 Zurich.

