

Amendment to beneficiary clause

Client number: _____

Policyholder:

First name, last name _____

Street, no. _____

Postcode, place _____

Date of birth _____

Marital status _____

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. 2 of the Ordinance of 13 November 1985 on the Fiscal Deduction of Contributions to Recognised Pension Plans (BVV 3) as well as Art. 9 of the Regulations of the Swiss Life 3a Employee Benefits Foundation.

The following persons are eligible as beneficiaries:

The insured person upon survival; in the event of his/her death in the following order:

No.	Beneficiaries	Change
1	The surviving spouse or The surviving registered partner.	No. 1 may not be changed.
2	Direct descendants as well as natural persons who were largely dependent on the insured person for their support, or a person who had cohabited with the insured person in a continuous marriage-like relationship in the five years prior to the latter's death, or who must support one or more children from the relationship.	Would you like to designate the beneficiaries under no. 2 and define their entitlements in more detail? <input type="radio"/> yes (please provide details below) <input type="radio"/> no
3*	The parents.	Do you want to change the beneficiaries of nos. 3-5? <input type="radio"/> yes (please provide details below) <input type="radio"/> no
4*	The siblings.	
5*	The other heirs.	

* If numbers 1 and 2 do not apply, the order of numbers 3 to 5 may be chosen freely.

* No. 5 also requires a mention in the will.



The numbers indicated above are amended as follows (detailed information on beneficiaries and quota share in percent):

Last name and first name	Date of birth	Address	Degree of kinship or relationship	Ratio in %

The above beneficiary clause applies exclusively to the assets in pension savings account 3a.

By submitting this declaration, the policyholder revokes all previous amendments to the beneficiary clause. In order for the claims to be asserted in the event of the insured person's death, the Swiss Life 3a Employee Benefits Foundation may request at the appropriate time further evidential documents, such as death certificate, will, certificate of inheritance, family book, confirmation of residence, rental contract, etc. The validity of the beneficiary clause depends on the situation and legal situation 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 Swiss Life Employee Benefits Foundation 3a

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: Swiss Life 3a Employee Benefits Foundation, c/o Swiss Life Wealth Management Ltd, Service Center, General-Guisan-Quai 40, P.O. Box, 8022 Zurich.

