

Change to beneficiary details



1. Details of the insured person

IBAN , FZ account		Date of birth	
First names		Street / No.	
Surname		Postcode / Town	
AHV number		Marital status	

2. Beneficiary clause

I have taken note of **Article 11** below of the **'Vested Benefits Regulations'** of the **HBL Vested Benefits Foundation** and, in the event of my death, designate the persons named below as beneficiaries in the following order and to the following extent:

Order	Percentage share	Beneficiary (surname, first name, date of birth, degree of kinship, address)

Art. 11 Death and Beneficiaries

1. If the pension scheme member dies before the vested benefits have been transferred or paid out as a retirement benefit, the vested benefits become payable as a death benefit.

2. The following persons are deemed to be beneficiaries:

1. In the event of survival: the policyholder
2. In the event of death:
 - a. the survivors as defined in Articles 19, 19a and 20 of the BVG,
 - b. natural persons who were substantially supported by the pension scheme holder, or the person who lived with the pension scheme holder in a continuous domestic partnership for the last five years prior to their death or who is responsible for the maintenance of one or more joint children,
 - c. the children of the deceased who do not meet the conditions set out in Article 20 of the BVG; in their absence, the parents; in their absence, the siblings;
 - d. the remaining statutory heirs, to the exclusion of the public authorities.

If several persons are beneficiaries under paragraph 2(a), the surviving spouse or registered partner shall be entitled to three-quarters of the vested benefits, unless the pension scheme member has stipulated otherwise. Children as defined in Article 20 of the BVG shall be entitled to one-quarter of the vested benefits.

The person who lived with the pension scheme member as a cohabiting partner must provide the Foundation, following the pension scheme member's death, with written proof of an uninterrupted cohabitation during the last five years. If the Foundation has not been informed of the existence of a cohabiting partner, it shall assume that no such partner exists.

The Foundation is not obliged to actively search for the partner. This also applies to persons who were supported to a significant extent by the pension scheme member, as well as to persons who are responsible for the maintenance of a joint child. Among the beneficiaries referred to in clause 2. b., only those persons known to the Foundation at the time of payment of the death benefit will be taken into account.

3. The Foundation may require the policyholder to provide a list of beneficiaries or grant them the option, within the limits of the law, to:

- to designate beneficiaries from within the categories provided for by law,
- to determine the shares to be allocated amongst the beneficiaries.

4. The death benefit will be paid out once all documents required to establish entitlement have been received. In particular, the Foundation may require:

- an official death certificate,
- a certificate of inheritance or equivalent official documents,
- evidence regarding the beneficiaries (e.g. marriage or civil partnership certificate, proof of cohabitation, evidence of maintenance payments).

4. Important note

A final assessment of the requested change can only be made at the time of the pensionable event, in accordance with the applicable regulatory and statutory provisions. The designation of beneficiaries may also be set out in a will. In this case, the pension scheme must be explicitly mentioned.

Place / Date _____

Signature _____

Please send us this form, together with all the required supporting documents, to the following address:

HBL Freizügigkeitsstiftung
Postfach
5600 Lenzburg