

## Change to beneficiary details



### 1. Details of the insured person

|                         |  |                 |  |
|-------------------------|--|-----------------|--|
| IBAN of pension account |  | Date of birth   |  |
| First names             |  | Street / No.    |  |
| Surname                 |  | Postcode / Town |  |
| AHV number              |  | Civil status    |  |

### 2. Beneficiary clause

I have taken note of **Article 8** below of the '**Pension Regulations for Pillar 3a**' of the **HBL 3a Pension 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. 8 – Order of beneficiaries in the event of death

1. In the event of the pension scheme member's death, the pension capital shall be paid to the following persons (beneficiaries):

- a) in the first instance, the surviving spouse or registered partner;
- b) in the absence of the above, the persons listed below:
  1. persons who were substantially supported by the pension account holder;
  2. the person who has lived in an uninterrupted cohabitation with the pension account holder for the last five years prior to the time of their death;
  3. persons who are responsible for the maintenance of a child of the couple;
- c) if none of the persons referred to in points (a) and (b) are present:
  1. the pension account holder's children,
  2. the parents,
  3. the siblings,
  4. the remaining legal heirs, to the exclusion of the public authorities.

2. The policyholder may, within the limits permitted by law:

- designate one or more beneficiaries from among the persons referred to in paragraph 1(b) and determine their shares;
- adjust the order and allocation within the groups referred to in paragraph 1(c). If the allocation is not clearly specified, the distribution amongst the relevant beneficiaries shall be made in equal shares.

3. The designation of beneficiaries must be made in writing (or in an electronic form expressly authorised by the Foundation) to the Foundation. The Foundation may provide forms or digital registration options for this purpose.

4. Where there is a cohabiting relationship within the meaning of paragraph 1(b), the entitled person must provide the Foundation with evidence of an uninterrupted cohabiting relationship during the five years preceding the death of the pension account holder. The Foundation is not obliged to actively identify potential partners or other persons who have not been reported.

### 3. Important note

A definitive assessment of the requested change can only be made at the time the pension entitlement arises, in accordance with the applicable regulatory and statutory provisions. The beneficiary designation 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 3a Vorsorgestiftung  
Postfach  
5600 Lenzburg