



Order of Precedence for Beneficiaries

Request for Change in the Order of Precedence for Beneficiaries under the Regulations

*Contract no.: _____
 *Policy no.: _____
 *Company: _____
 Street, no.: _____
 Zipcode, city: _____

1 Personal details concerning the insured person

*Last name: _____ *First name: _____
 *Street, no.: _____ *Zipcode, city: _____
 *Date of birth: _____ *Civill status: _____

2 The Regulations foresee, as a rule, the following order of precedence for beneficiaries

The surviving dependants shall be entitled, independent of the provisions of the law on inheritance, to such lump sum death benefit or refund of contributions as may be due in the following order of priority:

- a) ¹ the spouses or registered partners and orphans entitled to benefit under the regulations, and natural persons who were substantially provided for by the deceased,
 - ² the person who was in a partnership with the deceased without interruption during the last five years up to the deceased's death and the person who must provide for the maintenance of one or more mutual children;
 - ³ If no declaration according to para. 3 has been filed, the distribution shall generally be effected in equal shares.
- b) in the absence of beneficiaries pursuant to a): the children of the deceased who do not satisfy the requirements for entitlement to an orphan's pension in accordance with the regulations, ⁴ the parents or ⁵ the basis of the statutory division rules ⁶ the inheritance law

- c) In the absence of beneficiaries pursuant to a) and b): the other statutory heirs, to the exclusion of the body politic, on the basis of the statutory division rules under inheritance law to the amount of 50% of the remaining age assets.

There shall be no entitlement to survivors' benefits pursuant to a), Para. 2 of this provision if the beneficiary draws a spouse's, widow's, widower's or partner's pension from a previous marriage or partnership.

The insured person can specify the claims of the beneficiaries in a written declaration. Where special circumstances exist, the said declaration may also depart from the above order of priority of entitlement provided this achieves a better distribution according to the aims of the pension fund. An appropriate declaration must be given to the Foundation. Persons outwith the group described in paras. a – c cannot be accepted.

Entitlement to a spouse's pension should be notified using the form «Announcement of partnership».

3 *I wish to make the following addition or change to the order of precedence for beneficiaries – with reasons therefore:

Place, date _____

Signature of the insured person _____

Note: If a person who is a beneficiary under the Regulations asserts claims in the event of the death of the insured person, the Foundation cannot provide any assurance that the desired rule will be complied with.

Please return this form to:
 Helvetia Swiss Life Insurance Company Ltd, P.O. Box 3855, 4002 Basle