

**Vested Benefits Foundation of PFS  
Pension Fund Services AG**  
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Vested benefits account

# Change in order of beneficiaries in the event of death in accordance with Section 13 of the regulation

(for Instructions, see page 2)

Please send to:  
Vested Benefits Foundation of PFS  
Pension Fund Services AG  
P.O. Box, CH-8098 Zurich

## Personal data of pension account holder<sup>1</sup>

_____	_____
Last name	First name(s)
_____	_____
Street, no.	Postal code, city
_____	_____
Date of birth (dd.mm.yyyy)	AHV number / social security number (756.xxxx.xxxx.xx)
_____	_____
Marital status	Phone no.

Should I die, I hereby appoint my beneficiaries and specify their entitlements as follows in accordance with legal requirements (see page 2):

<b>Name/address</b>	<b>Date of birth</b>	<b>Degree of kin</b>	<b>Share %</b>
Group 1			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Group 2		failing them	
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Group 3		failing them	
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Group 4		failing them	
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

## Signature

I have taken note of the fact that the order of beneficiaries set out above applies exclusively to the assets in my PFS vested benefits account.

_____	_____	_____
Place	Date (dd.mm.yyyy)	Signature of pension account holder
		<b>Please enclose a copy of a signed identity card or passport</b>

# Instructions

on Section 13 of the regulations of the Vested Benefits Foundation of PFS Pension Fund Services AG.

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## 13. Beneficiaries

The following persons are eligible as beneficiaries in accordance with Art. 15 para. 1 lit. b and para. 2 of the OLP/FZV:

- a) in the event of survival, the pension account holder;
- b) in the event of death, the following in the **order set out below**:
  1. the survivors as set out in Art. 19, 19a and 20 of the Swiss Federal Law on Occupational Retirement, Survivors and Disability Pension Plans (LOB/BVG);
  2. natural persons supported to a significant degree by the pension account holder, or the person who was living with the pension account holder in a permanent domestic relationship for the last five years immediately prior to their death, or who is responsible for maintaining one or more joint children;
  3. children of the deceased who do not meet the requirements stipulated in Art. 20 of the LPP/BVG; if there are no children at the time of death, then the parents; if the parents are no longer alive at the time of death, then the siblings;
  4. other legal heirs, with the exception of public entities.

The pension account holder may **set out the entitlements of the beneficiaries in greater detail in the agreement and extend the scope of persons as defined in para. 1 letter b point 1 to include those listed under point 2.**

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### Definition and sequence of beneficiaries

#### Group 1 Survivors as defined in Art. 19, 19a and 20 BVG/LOB

- Widows or widowers and surviving registered partners or people who are deemed equivalent to such in the eyes of the law (divorced spouses or ex-partners from a legally dissolved registered partnership resp. persons legally equal to them in accordance with Art. 20 BVV 2/OPP 2).
  - Children until 18th birthday or end of studies/training (up to 25th birthday maximum).
  - Foster children, if deceased was responsible for support, provided they were under the age of 18 or still in education/training at the time of death (up to 25th birthday maximum).
- failing them

#### Group 2 Natural persons supported to a significant degree by the pension fund member

- A person who, over a substantial period, received regular and significant **financial** support from the pension account holder.

**The person who was living with the pension account holder in a permanent domestic relationship for the last five years immediately prior to their death, or who is responsible for maintaining one or more joint children.**

- Partner failing them

#### Group 3 Children who do not meet the requirements stipulated in Article 20, the parents or the siblings.

- Children aged 18 and above and who are no longer in education/training.

failing them

#### Group 4 Other legal heirs pursuant to the Swiss Civil Code

- Beneficiaries under will who are not legal heirs are not eligible as beneficiaries.

<sup>1</sup>The singular form also includes the plural, and all masculine terms referring to persons refer to persons of both genders.