

Amendment to beneficiary clause

Client number: _____

Insured person:

First name, last name _____

Street, no. _____

Postcode, town _____

Date of birth _____

Marital status _____

AHV no. _____

Phone no. (in case of questions) _____

E-mail address _____

In the event of their death, the insured person 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 their death in the following order:

No.	Beneficiaries	Change
1	<ul style="list-style-type: none"> The surviving spouse The surviving registered partner 	No. 1 may not be changed.

If there are no beneficiaries under No. 1, the share of the beneficiaries can be defined in more detail in No. 2. Please enter the beneficiaries' personal details in the table on the next page.

No.	Beneficiaries	Change
2	<ul style="list-style-type: none"> Direct descendants Natural persons who were largely dependent on the insured person Person with whom a marriage-like relationship had existed continuously in the five years prior to his/her death Person who is obliged to 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="checkbox"/> yes (please provide details on the next page) <input type="checkbox"/> no

If there are no beneficiaries under nos. 1 and 2, the following table can be used to determine both the order of nos. 3, 4 and 5 as well as the shares of the beneficiaries within the respective no. Please enter the beneficiaries' personal details in the table on the next page.

No.	Beneficiaries	Change
3	The parents.	Do you want to change the order of nos. 3–5? <input type="checkbox"/> yes (please provide details below) <input type="checkbox"/> no
4	The siblings.	
5*	The other legal heirs.	

* No. 5 requires a mention in the will. The beneficiaries must be listed by name.

The nos. referred to are amended as follows:

(Detailed information on the beneficiaries and percentage shares)

No.	Last name, first name	Date of birth	Address	Degree of kinship or relationship	Share in %

Place, date

Insured person's signature

The above beneficiary clause applies exclusively to the assets in the Pando pension custody account.

By submitting this declaration, the insured person 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.

Please return the signed beneficiary clause to Customer Support at Pando:
support@pando.swisslife.info