

OCCUPATIONAL PENSION INSURANCE

Notification of life partner

Employer

Contract no.*

Insured person no.*

*Fields can be completed by Allianz Suisse Life

IMPORTANT INFORMATION

The purpose of this notification is to establish any claims to survivors' benefits under the General Terms and Conditions (GTC) in favour of the surviving life partner.

A check of whether the nominated life partner meets all the conditions for entitlement shall only be conducted in the event of the insured person's death.

The insured person can nominate his or her life partner as the beneficiary of the following survivors' benefits:

– Life partner's pension and any lump-sum death benefit

or

– Life partner's pension but no lump-sum death benefit

or

– No life partner's pension but any lump-sum death benefit

If no notification is provided or the form is only submitted after the insured person's death, the life partner has no entitlement to survivors' benefits from the outset.

This choice is not available for vested benefits policies. Instead, the sum insured is paid out as a lump sum in the event of the policyholder's death. In this case, you only have to provide a signature on page 2 – it is not necessary to check a box under "Survivors' benefits".

INSURED PERSON

Surname

First name

Street, no.

Postcode, town/city

Date of birth

AHV no.

Gender

Male

Female

Marital status

LIFE PARTNER

Surname

First name

Street, no.

Postcode, town/city

Date of birth

AHV no.

Gender

Male

Female

Marital status

Start of life partnership:

SURVIVORS' BENEFITS

If the life partner is to receive a life partner's pension and any lump-sum death benefit in the event of your death, please put a cross in both boxes.

If the life partner is to receive only the life partner's pension or any lump-sum death benefit, please only put a cross in the box for the benefits you want him/her to receive.

Life partner's pension

Any lump-sum death benefit

This comprises the lump-sum death benefit from purchases, the lump-sum death benefit from repayment of unappropriated retirement assets and the additional lump-sum death benefit

If only a life partner's pension is selected, the other beneficiaries shall be entitled to any lump-sum death benefit in accordance with the sequence set out in the Pension Rules:

- the children within the meaning of Article 252 ff. of the Swiss Civil Code (ZGB); in their absence
- the parents; in their absence
- the siblings; in their absence
- the remaining legal heirs, to the exclusion of the community.

SIGNATURE

The undersigned confirms that the information provided is correct

(Place and date)

(Signature of the insured person)