



Civil partnership agreement

Please note: Please refer to the legal provisions on the reverse side when filling in this form.

1. Contracting parties

Insured

Last name _____

First name _____

Date of birth _____

Civil status _____

Address _____

Civil partner

Last name _____

First name _____

Gender female male

Date of birth _____

Civil status _____

Address _____

Please attach a copy of the ID or passport of both contracting parties.

2. Civil partnership details

- We have been living together in a verifiable partnership for an uninterrupted period.

Civil partnership since: _____ (month/year)

- The Insured provides substantial financial support for the civil partner.
- The civil partner provides financial support for one or more joint children listed below.

Last name	First name	Date of birth
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



3. Regulatory provisions

Regulations Art. 16: Pension benefits/order of beneficiaries

Entitlement to pension benefits arises:

- On reaching retirement age, payable from the pension assets;
- In the event of disability (pursuant to Art. 15, para. 2 of the Regulations) payable from the pension assets and – where a term insurance policy is in force – also from any entitlement to the policy benefits;
- In the event of death, payable from the pension assets and – where a term insurance policy is in force – also from any entitlement to the policy benefits.

For the preservation of insurance cover, the following are deemed to be beneficiaries:

- a) In the case of survival, the Insured;
- b) After the Insured's decease, the following persons in the order stated:

1. The survivors, as stipulated in Art. 19, 19a and 20 of the Federal Act on Occupational Retirement, Survivors' and Disability Pension Plans (BVG);
2. The individuals who received substantial financial support from the Insured; or the person who lived in a civil partnership with the Insured for an uninterrupted period of five years prior to the Insured's disease or who is responsible for the maintenance of one or more joint children;
3. The children of the deceased who do not satisfy the conditions of Art. 20 BVG, the parents or the siblings
4. Any other legal heirs, excluding common law relationships.

The Insured can give more specific instructions on the beneficiaries' entitlements and also extend the circle of persons stipulated in letter b) point 1 with those named in point 2. The Insured must provide a written order of beneficiaries which shall be lodged with the Foundation. Unless the Insured makes a specific apportionment of the entitlements of the beneficiaries in the same group, the Foundation will divide the pension assets equally among them all.

Supplementary provision for payout to the civil partner

1. Basic principle

The lump sum payment is specified in Art. 16 of the Regulations. In principle, civil partners should be treated exactly the same as marriage partners and all the conditions for the payment of a lump sum should be at least the same for both married and civil partners.

2. Supplementary provisions

The following provisions apply in addition to Art. 16 of the Regulations:

1. In the case of decease, entitlement to a lump sum payment exists as long as the criteria stipulated in Art. 16 of the Regulations are met and the current conditions are satisfied at the time the payment is made.
2. The (civil) partnership must be registered in writing with the vested benefits foundation in the form of an officially certified partnership agreement. A specimen agreement drafted by the Foundation should be used for this purpose, which must be signed by both partners and forwarded to the Foundation while both partners are still alive.
3. The Foundation must be notified immediately in writing if there is any amendment or nullification of the partnership. If the amendment or nullification of a partnership is notified too late, or not at all, to the Foundation, the Foundation shall not be held liable for benefits already paid out.
4. In the event of marriage or if the partnership is nullified there is no longer any entitlement to a lump sum payment pursuant to Art. 16 para 2, letter b, point 2 of the Regulations.

Place, date

Signature of the Insured

Place, date

Signature of the civil partner

Official certification of both signatures (by a public official or notary in Switzerland, or an embassy abroad)

Place, date

Stamp and signature of the authenticating party