



Change in the order of beneficiaries

Insured person

Mr Mrs

First name	_____	Last name	_____
Street/House-No.	_____	ZIP/Place	_____
Date of birth	_____	Marital status	_____
OASI no.	_____	Account no.	_____

Article 16 Beneficiaries of the regulation

The following persons are deemed to be beneficiaries:

- a) in the event of survival, the account holder himself;
- b) after his decease, the following persons in the order below:

1. the surviving spouse/partner;
2. direct heirs or natural persons for whose maintenance the deceased was primarily responsible or a person who was cohabiting with the account holder for an unbroken period of at least five years prior to his death or who has to provide for the maintenance of one or more joint children;
3. the deceased's parents;
4. the deceased's siblings;
5. other heirs.

The member can nominate one or more beneficiaires from among those listed in letter b, number 2, and specify their entitlements in more detail.

The (civil) partnership must be registered in writing with the Pillar 3a 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.

The Foundation must be notified immediately in writing if there is any amendment or nullification of the partnership. If the amendment or nullification of partnership is notified too late, or not at all, to the Pillar 3a Foundation, the Foundation shall not be held liable for benefits already paid out.

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.

The member has the right to change the order of beneficiaries under letter b, numbers 3 to 5, and specify their entitlements in more detail.

Details of the beneficiaries must be lodged with the Foundation in writing by the account holder. Where the account holder does not specify the entitlements of beneficiaries in the same group, the Foundation will divide the pension benefits equally among the persons concerned.

In the event of my death, I specify the persons below and their entitlements (share) in accordance with Article 16 of the regulation of the J. Safra Sarasin Pillar 3a Foundation in the following order:

Name, address, date of birth	Degree of relationship	Share
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

I hereby acknowledge that the beneficiaries appointed by me, in the event of them not being my legal heirs, also require an appointment of heirs stipulated in a will or testamentary contract in order for the nomination of beneficiaries to be legally valid. I confirm that the order in which the beneficiaries are listed above is legally effective only for the capital in the pillar 3a account/custody account. Any additional insurance combined with this account therefore requires separate arrangements in the event of my death.

Place, date	Signature of insured person
_____	_____