



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 Pension benefits/Beneficiaries of the regulation

The pension benefits will consist:

- of the pension assets when retirement age is reached;
- in the case of disability (as defined in Article 15, subsection 2 of the regulations), of the pension assets and additionally - where risk insurance has been arranged - of the right to claim insurance benefits;
- in the case of death, of the pension assets and additionally - where risk insurance has been arranged - of the right to claim insurance benefits.

For the maintenance of pension cover, the following are deemed to be beneficiaries:

- a) the event of survival, the account holder himself;
- b) after his decease, the following persons in the order below:
1. the survivors as defined in Articles 19, 19a and 20 of the LPP;
 2. 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. any children of the deceased who do not satisfy the condition laid down in Article 20 of the LPP, his parents or siblings;
 4. any other legal heirs, excluding public bodies.

The member can define the beneficiaries' claims in more detail and extend the group of persons mentioned in letter b, number 1 to include those in number 2.

The (civil) partnership must be registered in writing with the vested benefits foundation in the form of an officially certified partnership agreement. A specim 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 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.

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.

Details of the beneficiaires must be lodged with the Foundation in writing by the member.

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 Vested Benefits Foundation in the following order:

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

I confirm that the order of beneficiaries specified above only has legal validity for the assets held in my vested benefits account/custody account. Any supplementary insurance policy offering death benefit cover that is linked to this account therefore requires a separate arrangement to be made.

Place, date	Signature of insured person
_____	_____