

Account number

## Amendment of the beneficiary order in the event of death

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### Personal data of the Contracting Party

Surname

First name

Street, number

Postcode

City or town

Date of birth

Civil status

Citizenship

Telephone number

Social security number

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### Benefit in the event of death

In addition to the pension fund regulations of the Zugerberg 3a Vorsorgestiftung, the Contracting Party shall determine the beneficiaries and their entitlements in the event of their death as follows within the framework of the statutory provisions:

#### Circle 1

Surname, first name, date of birth	Street, city or town	Degree of kinship	Quota in %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

#### Circle 2 (in the absence of the persons listed under circle 1)

Surname, first name, date of birth	Street, city or town	Degree of kinship	Quota in %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Circle 3 (in the absence of the persons listed under circle 1 and 2)

Surname, first name, date of birth	Street, city or town	Degree of kinship	Quota in %

Note: Please note the permissible options according to the information sheet "Benefit in the event of death".

### Civil partnership / dependent person

Surname

First name

Date of birth

Cohabitation since (a minimum of 5 years)

### Signature and confirmation

With their signature, the Contracting Party confirms

- that this application and the documents submitted are correct and complete.
- that they have read the information sheet "Benefit in the event of death".
- that they revoke all previously issued beneficiary orders.
- that they will notify the Foundation of changes in marital status and other changes that may affect entitlements.
- that they take note that the validity of these special beneficiary regulations shall not be determined according to the current circumstances or the current regulatory and legal provisions, but according to those at the time of death.
- that they take note that the above-mentioned beneficiary regulations are only legally effective for the credit balance on the pension account with the Zugerberg 3a Vorsorgestiftung.
- that they have lived with the person listed above under "Partner / dependent person" for at least 5 years without interruption or have supported the person to a considerable extent during their lifetime (requirement: at least 20% of the living costs) or that the person must provide for one or more joint children.

Place, date

Signature of the Contracting Party

Place, date

Signature of partner / supporting person

### Delivery by mail

Please return the completed form with all relevant documents to:  
Zugerberg 3a Vorsorgestiftung, Lüssiweg 47, CH-6302 Zug