

Account number

Disbursement in the event of death

Personal data of the deceased Contracting Party

Surname

First name

Street, number

Postcode

City or town

Date of birth

Civil status

Citizenship

Date of death

Social security number

Personal data of beneficiary 1

Surname

First name

Street, number

Postcode

City or town

Country

Civil status

Citizenship

Date of birth

Social security number

Degree of kinship

Main residence (tax domicile)

Telephone number

E-mail address

Payment instructions of beneficiary 1

Bank name

Swift / BIC

IBAN / account number

In the name of (surname, first name)

Note: Please note that it is essential that the account be in the name of the beneficiary. The transfer is made in Swiss francs; also for transfers abroad. Either a lump-sum payment is reported to the tax authorities, or a withholding tax deduction is made for the pension assets paid out.

Personal data of beneficiary 2

Surname

First name

Street, number

Postcode

City or town

Country

Civil status

Citizenship

Date of birth

Social security number

Degree of kinship

Main residence (tax domicile)

Telephone number

E-mail address

Payment instructions of beneficiary 2

Bank name

Swift / BIC

IBAN / account number

In the name of (surname, first name)

Note: Please note that it is essential that the account be in the name of the beneficiary. The transfer is made in Swiss francs; also for transfers abroad. Either a lump-sum payment is reported to the tax authorities, or a withholding tax deduction is made for the pension assets paid out.

Personal data of beneficiary 3

Surname

First name

Street, number

Postcode

City or town

Country

Civil status

Citizenship

Date of birth

Social security number

Degree of kinship

Main residence (tax domicile)

Telephone number

E-mail address

Payment instructions of beneficiary 3

Bank name

Swift / BIC

IBAN / account number

In the name of (surname, first name)

Note: Please note that it is essential that the account be in the name of the beneficiary. The transfer is made in Swiss francs; also for transfers abroad. Either a lump-sum payment is reported to the tax authorities, or a withholding tax deduction is made for the pension assets paid out.

Due date

The payment will be made on the next possible date.

Note: The processing time can be up to 25 working days as of receipt of the letter. The Foundation carries out a portfolio valuation twice a month, in the middle and at the end of each month. The closing value of the Contracting Party's account is based on the value that is determined after the Foundation has received the legally valid notice of termination including the documents required by the Foundation. The disbursement of the balance value to the Contracting Party will be made within 10 business days after the valuation of the securities account, after the Foundation has received all the necessary documents and complete (transfer) information from the Contracting Party.

Documents to be submitted

- Copy of an official ID with signature of the beneficiaries or their legal guardians
- Copy of the death certificate, the updated family record book / family record book or the death certificate of the Contracting Party
- Copy of the will and the certificate of inheritance as well as the official list of heirs

- In the event of **renouncement of the inheritance**: Record of renouncement of the inheritance and official list of heirs
- In the event of a **divorce**: Copy of the divorce decree or copy of the court decision on the dissolution of the registered partnership
- In the case of **spouses or registered civil partnership**: Marriage certificate / partnership certificate
- In the case of an **(unregistered) civil partnership**: Confirmation of registration from the residents' registration office of the municipality of residence of the deceased Contracting Party and their partner for the last five years until death, as well as a cohabitation agreement
- For **children**: Education / vocational training certificate for children between 18 and 25 years of age (if undergoing education / vocational training at the time of death)
- For **orphans' pensions**: Copy of the OASI ruling on orphan's and widow's pensions
- In the event of **full disability**: DI evidence

Note: The Foundation is entitled to make further inquiries and may request additional documentation to verify eligibility. The legal or regulatory beneficiary regulations form the basis for the benefits to be awarded. If the Contracting Party had submitted an application for a change in the order of beneficiaries to the Foundation, this may result in a deviation from the beneficiary order set out in the regulations.

Signature and confirmation

With their signature, the Contracting Party / Parties confirm(s)

- that this document and the other documents submitted are correct and complete.
- that they are aware that, depending on their tax domicile, a capital benefit report will be made to the tax authorities, or withholding tax will be deducted from the balance value.
- that they will fully indemnify the Zugerberg Freizügigkeitsstiftung, should the latter be required to pay benefits to further beneficiaries who take precedence over the undersigned in accordance with the beneficiary order. Several beneficiaries are jointly and severally liable towards the Foundation.

Place, date

Signature of beneficiary 1

Place, date

Signature of beneficiary 2

Place, date

Signature of beneficiary 3

Delivery by mail

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