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In order to make a person in receipt of substantial support from you a beneficiary of a lump sum payable on death, fill in the form attached and return a signed copy of it to us. When doing so please observe the following:

- The **standard order of beneficiaries** can be seen in **Article 18** of the Pension Fund Regulations (see www.pk-complan.ch).
- Persons in receipt of **substantial support** from you (with the exception of divorced spouses) are only entitled to the lump sum payable on death if you have supplied comPlan with a written beneficiary declaration for the lump sum payable on death while still alive.
- In the event of death, the spouse entitled to a spouse's pension receives the whole lump sum – independently of inheritance rights. **If your spouse does not meet the requirements for a spouse's pension** (financially responsible for children or aged at least 40 and 5 years married or living in the same household / full IV pension) **and you do not significantly support them, you can make them a beneficiary of the lump sum payable on death using the beneficiary declaration as per Art. 18 of the Pension Fund Regulations.**
- **The beneficiary declaration for the lump sum payable on death must be submitted before your death.**
- **We only check the entitlement to payments after your death.**
- If you want to make your **partner** the beneficiary of a lump sum payable on death, you must fill in a separate **support agreement** (a different comPlan form) at the first opportunity.
- In order to regulate the distribution of the **lump sum payable on death between children, parents and siblings** differently to the default entitlement as per Article 18 a **separate amendment to the order of beneficiaries in the event of death** (another comPlan form) must be filled in.

After receiving the form, we will send you an acknowledgement of receipt.

Beneficiary declaration for the lump sum payable on death

Making persons in receipt of substantial support eligible as per the Pension Fund Regulations Art. 18 Para 5.

Policyholder

Last name/first name

Date of birth/social security number

.....
Street/house no. / town and postal code

.....
Marital status

1. This explanation shall serve as the basis for any claims to lump sums payable on death from comPlan by any significant beneficiaries as per the Pension Fund Regulations Art. 18 Para 5.
2. I am aware of and acknowledge the regulatory provisions on the lump sum payable on death and their eligibility requirements.
3. In the event of my death before reaching pensionable age, as a recipient of a disability pension before reaching the age of 65 I want the lump sum payable on death to be shared out among the following persons whom I substantially support (excluded from this is my divorced spouse). In the event of there being multiple beneficiaries their respective shares is also given, otherwise the lump sum is to be paid out in equal proportions:

Beneficiary Name and address	Date of birth	Relationship to me (e.g. spouse, child, parent etc.)	Share in %

Place and date

Signature of the policyholder

.....
We hereby confirm receipt of the beneficiary declaration for the lump sum payable on death. The payment of benefits is subject to regulatory and legal requirements at the time of death.

Place and date

comPlan