

## Schindler Pension Fund

### Nomination of the life partner as beneficiary of the lump-sum death benefit

#### Purpose of this form

A lump-sum death benefit will be paid out should an active insured die before they retire and no claim to survivors' benefits pursuant to Art. 13.1 and 13.2 exists. The purpose of this form is to nominate the same-sex or opposite-sex life partner as beneficiary of the lump-sum death benefit, as defined under the Regulations.

#### Basis in the Regulations - Article 13.10 Pension Fund Rules, Version of January 1, 2021

- 13.10 The following are entitled to the lump sum death benefit in the order of precedence shown:
- a) Natural persons who were supported to a considerable extent by the insured, or a partner with whom the insured had cohabited without interruption during the last five years before their death, or who is responsible for financially supporting one or more joint children, provided that the partner is not married and is not related to the insured. However, a cohabiting partnership entitling a partner to a pension must be confirmed in writing and the confirmation signed by both partners. To this end, the beneficiary form provided by the Pension Fund must be completed and submitted to the Pension Fund administration before the death of the insured.
  - b) The children of the deceased, followed by the deceased's parents, and finally their siblings.

#### Rights and obligations

1. The beneficiary nomination is valid only if submitted to the Schindler Pension Fund prior to the death of the insured using the present form, which should be duly signed by both the insured and their partner.
2. The insured can revoke the beneficiary nomination at any time in writing, even without the consent of the beneficiary. In this case, the general order of precedence of beneficiaries is reinstated.
3. The present beneficiary nomination replaces any previously submitted nominations.
4. If an insured revokes or amends the beneficiary nomination, the previous beneficiary will not be informed by the Schindler Pension Fund.
5. The Schindler Pension Fund is to be informed in writing immediately if the life partnership is dissolved or if the insured or the beneficiary marries, both of which might affect the entitlement.
6. The claim to the lump-sum death benefit lapses when the insured or the beneficiary marries.
7. It is the duty of the person claiming beneficiary status to prove that they fulfil the entitlement criteria (e.g. five years of uninterrupted cohabitation, material support, etc.). The Schindler Pension Fund's evaluation as to whether or not such criteria have been met will be based on the circumstances at the time of the death of the insured. The statutory provisions and those of the Pension Fund Rules, in force at the time of the death of the insured, will apply.
8. The entitlement to the lump-sum death benefit of the children, as well as of the parents and of the siblings of the insured, lapses if the life partner is nominated as beneficiary.
9. Nomination as beneficiary of the lump-sum death benefit lapses automatically when disability or retirement benefits fall due for payment.

# Schindler Pension Fund

## Insured person

Surname .....  
First name .....  
Date of birth .....  
Marital status  single  married  separated  divorced  
 registered partnership  widowed  
 dissolved partnership

## Beneficiary

Surname .....  
First Name .....  
Date of birth .....  
Sex  female  male  
Marital status  single  married  separated  divorced  
 registered partnership  widowed  
 dissolved partnership

## Confirmation

The insured person and the beneficiary hereby confirm that:

- a life partnership exists
- they have taken note of and acknowledge the conditions set out in this form.

Commencement of partnership:  
.....

Current residential address of the beneficiary:  
.....

## Signatures

Place, date .....  
Signature .....  
  
Insured person Beneficiary  
*Please enclose a copy of* *Please enclose a copy of*  
*your passport or ID card!* *your passport or ID card!*

## Please submit to:

Schindler Pensionskasse, Zugerstrasse 13, 6030 Ebikon