



Registration of a life partnership (General Framework Regulations Article 16, Para. 2)



Company _____ Contract no. _____

Information on the insured person

Surname _____ First name _____

Date of birth _____ Social insurance no. 756. _____

Street/no. _____ Post code/city _____

Information on the life partner

Surname _____ First name _____

Date of birth _____ Social insurance no. 756. _____

Joint household

Do you have a joint domicile?

Yes

Date of registration with
the municipality of domicile _____

No, address of the life partner (only possible where there are joint children)

Street/no. _____ Post code/city _____

Joint children

First name/Surname _____ Date of birth _____

First name/Surname _____ Date of birth _____

First name/Surname _____ Date of birth _____

First name/Surname _____ Date of birth _____

Eligibility

Under the same conditions and reduction provisions, which have the same meaning as for the spouse pension, the life partner designated by the insured person (of the same or different sex) shall be entitled to a survivor's pension, if specified by the pension plan.

The life partner shall be entitled to a survivor's pension to the amount of the spouse pension or a one-off settlement if

- a. the insured person and the life partner are not married and there would have been no legal reason (Art. 94 ff. of the ZGB [Swiss Civil Code]), with the exception of them being of the same sex, against the two parties marrying and there is no step-child relationship between them.
- b. the partner does not draw a widow's pension, widower's pension or the partner's pension under a pillar 2 retirement benefit plan;
- c. the partner is proven to have been living in a permanent and exclusive relationship as a couple in a joint household with the deceased insured person for at least five years immediately before death or lived immediately before death in the same household in a partnership and provides the maintenance for one or more joint children, who are entitled to an orphan's pension according to the regulations.

Requirements

The insured person must have reported their beneficiary in writing to the business unit before a pension case arises during their lifetime. If this report was not made, no benefit shall become due. Life partner of married insured persons shall not be entitled to a partner's pension. In the event benefit payments, the business unit shall conclusively determine whether the entitlement requirements have been satisfied for a life partner's pension.

Death of Pensioner

If a pensioner dies, there shall only be an entitlement to a life partner's pension if an entitlement already existed during the active period for the deceased insured person.

Conclusion

The partner's pension shall end upon marriage, upon entry into a new life partnership or on the death of the pensioner.

We hereby confirm that all details are true, complete and correctly entered and that we acknowledge the information.

Place, date

Signature of the insured person

Place, date

Signature of the life partner

Swisscanto 1e Collective Foundation
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