

Application for payout of retirement savings account 3a in the event of death

Please use block capitals. All references to persons apply to both genders.

Order of beneficiaries

In the event of death, the retirement assets are paid out in accordance with the order of beneficiaries set out in law (Art. 2 BVV 3). Retirement savings do not constitute an inheritance claim and are therefore not part of the estate.

The groups are prioritized in the following order. This means that e.g., persons in Group 2 will only receive capital if persons in Group 1 do not exist. If there are multiple beneficiaries in the same Group, capital is divided up equally between them.

Group 1: the surviving spouse or registered partner

Group 2: the direct descendants and any natural persons for whose maintenance the deceased was significantly responsible, or the person who was living with the deceased in a permanent domestic relationship for the last five years immediately prior to their death, or who is responsible for maintaining one or more joint children

Group 3: the parents

Group 4: the siblings

Group 5: other heirs (according to the certificate of inheritance), excluding any payments due to the state or municipal institutions

Details of the deceased pension account holder

Retirement savings account no. _____	
AHV no. / social security number _____	
Last name _____	First name _____
Street _____ No _____	Country _____
Postcode _____	Location _____
Date of birth (dd.mm.yyyy) _____	Date of death (dd.mm.yyyy) _____
Marital status _____	

To join in any case

- Official identity document of the beneficiary or their legal guardian
- Certificate of inheritance
- Family registration certificate of the deceased pension account holder or death certificate if married or in registered partnership
- Deed of appointment in the case of an executor
- Inheritance disclaimer record if the inheritance is repudiated

Depending on the beneficiaries the following additional documents must be enclosed

- Partner** Proof of residence of the pension account holder and the partner from the local municipality for the last five years until death and a cohabitation agreement
- Parents** Family registration certificate of the deceased pension account holder or birth certificate of the deceased pension account holder
- Siblings** Family registration certificate of the parents

Notice

Any shares in the PF Pension retirement funds will be sold as soon as the PostFinance Retirement Savings Foundation 3a receives confirmation of the death of the account holder. Upon death assets are no longer subject to interest accrual.

Please ensure that this application has been completed in full, signed by the applicant, and includes all relevant supporting documents. The documents submitted will not be returned. Copies are accepted. Documents in foreign languages must be submitted with a certified translation into German, French, Italian or English.

Number of present beneficiaries _____

Beneficiary details (complete and print this page for each beneficiary)

Last name _____ First name _____
Street _____ No _____
Postcode _____ Location _____
Country _____ Date of birth (dd.mm.yyyy) _____
AHV no. / social security number _____
Next of kin/relationship to the deceased pension account holder _____
Phone number in the event of queries _____

Your account details

Name of bank _____
IBAN/SWIFT _____
In the name of _____

For transfers to a foreign bank please provide detailed payment instructions (IBAN or SWIFT). The transfer will be made in Swiss francs (CHF) on the beneficiary's account. A capital payment declaration or a deduction of tax at source will be applied to the assets paid out.

Signature

Location _____

Date _____
(dd.mm.yyyy)

 _____

Signature of beneficiary or legal representative

Please send the form to:
PostFinance Retirement Savings Foundation 3a
Retirement savings account 3a
P.O. Box
8098 Zurich

Please leave empty

Date (dd.mm.yyyy) _____ Customer advisor _____