

## Amendment to the General Order of Beneficiaries

### 1. Personal Data

Last name/first name	
Street/Number/Postal Code/Town	
Date of birth	
Personnel number (PID no.)	
Marital Status	<input type="checkbox"/> single <input type="checkbox"/> married <input type="checkbox"/> divorced <input type="checkbox"/> widowed <input type="checkbox"/> in a registered partnership (in accordance with the Federal Act on the Registration of Partnerships for Same-Sex Couples) <input type="checkbox"/> dissolved partnership (in accordance with the Federal Act on the Registration of Partnerships for Same-Sex Couples)

### 2. Important Notice

- If the sequence of beneficiaries within a category is to be changed, or if the lump sum payable at death is to be divided between several beneficiaries in the same category, the "Amendment to the General Order of Beneficiaries" form must be submitted to the Pension Fund of Credit Suisse Group (Switzerland) by the insured, pension recipient or recipient of a disability pension during his/her lifetime. If there is no "Amendment to the General Order of Beneficiaries" form on file, the Pension Fund of Credit Suisse Group (Switzerland) will pay out the lump sum payable at death in equal parts, in the sequence prescribed by the Regulations.
- If persons in category a. section ac) are to be named as beneficiaries, the "Amendment to the General Order of Beneficiaries" form must always be submitted. These persons should be entered on the form in category a. section ac). If there is no such entry, these persons cannot be included in the payment of the lump sum payable at death.
- In the case of death of the insured person/pension recipient, the Pension Fund of Credit Suisse Group (Switzerland) verifies whether it is possible to distribute the lump sum payable at death in accordance with the submitted order of beneficiaries.
- It is recommended that the submitted order of beneficiaries should be periodically checked. If an existing beneficiary clause is no longer desired or possible (e.g. death of a beneficiary), a new "Amendment to the General Order of Beneficiaries" should be submitted. Otherwise, the Pension Fund of Credit Suisse Group (Switzerland) retains the right to distribute the lump sum payable at death in equal parts in accordance with the sequence prescribed in the Regulations.
- With each newly submitted "Amendment to the General Order of Beneficiaries" form, the insured person or pension recipient revokes all "Amendment to the General Order of Beneficiaries" forms previously submitted to the Pension Fund of Credit Suisse Group (Switzerland).
- It is incumbent upon those persons asserting a claim to the lump sum payable at death to prove that they fulfill the eligibility requirements. The Pension Fund of Credit Suisse Group (Switzerland) is entitled to ask the potential beneficiaries for any documents required for clarification.
- The provisions of the regulations in force at the time of the death of the insured person or pension recipient are decisive.
- The Pension Fund's "Amendment to the general order of beneficiaries" form is valid for both Pension Fund 1 and Pension Fund 2 (Art. 58(6) of the pension fund regulations of Pension Fund 2).

### 3. Acknowledgment of Receipt

The Pension Fund of Credit Suisse Group (Switzerland) will provide acknowledgment of receipt of the form within 30 days. If you have not received such acknowledgment within this period, please contact the Pension Fund of Credit Suisse Group (Switzerland).

### 4. Amendment to the General Order of Beneficiaries

I wish to amend the general order of beneficiaries in categories a. – c. in accordance with the Art. 65(2) of the Regulations of the Pension Fund of Credit Suisse Group (Switzerland):

	Beneficiaries, <sup>3</sup>		Share in % <sup>2</sup>
	Last name, First name	Date of birth	
a. aa) the spouse;	_____	_____	_____
ab) those children of the deceased person who are entitled to an orphan's pension;	_____	_____	_____
	_____	_____	_____
ac) natural persons who were supported to a considerable extent by the insured (enclose a support contract);	_____	_____	_____
or the person with whom the insured had lived in a cohabiting household without interruption during the five years preceding death;	_____	_____	_____
or the person who is responsible for the maintenance of one or more shared children;	_____	_____	_____
b. in the absence of beneficiaries under a.			
ba) those children of the deceased who are not entitled to an orphan's pension;	_____	_____	_____
	_____	_____	_____
bb) the parents;	_____	_____	_____
	_____	_____	_____
bc) the siblings and half-siblings;	_____	_____	_____
	_____	_____	_____
c. in the absence of beneficiaries under a. or b.			
Other legal heirs, to the exclusion of the community.	_____	_____	_____
	_____	_____	_____

<sup>1</sup> Persons included in b. can only benefit if there are no beneficiaries in accordance with section a., persons included in c. can only benefit if there are no beneficiaries in accordance with sections a. and b.

<sup>2</sup> State the percentage share of the total capital (%), and not the Swiss franc amount.

<sup>3</sup> In the absence of beneficiaries under section a. aa) and ac) children under a. ab) and b. ba) are combined in a single group of beneficiaries.

**5. Signature**

The insured person or the pension recipient declares that he/she has noted the content of this form and of Art. 65 of the Regulations of Pension Fund of Credit Suisse Group (Switzerland).

Place, date

Signature of the insured/pension recipient

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Please send the form, duly signed, to the Pension Fund of Credit Suisse Group (Switzerland), JPKS 1.