

## Beneficiary declaration

Company \_\_\_\_\_  
 Policy no. \_\_\_\_\_  
 Plan \_\_\_\_\_

### Insured party

Last name \_\_\_\_\_ First name \_\_\_\_\_  
 Street/no. \_\_\_\_\_ Postcode, town/city \_\_\_\_\_  
 NI no. 756. \_\_\_\_\_  
 Marital status \_\_\_\_\_ Date of birth \_\_\_\_\_  
 Telephone \_\_\_\_\_ Email \_\_\_\_\_

I have taken note of **Article 6.6 of the pension plan regulations** and, in the event of my death before the regulatory retirement age, request that the lump-sum death capital due be paid to the following people:

### Beneficiary 1

Last name \_\_\_\_\_ First name \_\_\_\_\_  
 Street/no. \_\_\_\_\_ Postcode, town/city \_\_\_\_\_  
 Date of birth \_\_\_\_\_  
 Relationship to insured party \_\_\_\_\_ (e.g. brother)  
 Share of lump-sum death capital \_\_\_\_\_ (in % or in fractions)

### Beneficiary 2

Last name \_\_\_\_\_ First name \_\_\_\_\_  
 Street/no. \_\_\_\_\_ Postcode, town/city \_\_\_\_\_  
 Date of birth \_\_\_\_\_  
 Relationship to insured party \_\_\_\_\_ (e.g. brother)  
 Share of lump-sum death capital \_\_\_\_\_ (in % or in fractions)

With this declaration, I revoke all beneficiary declarations previously made under the policy number listed above. I undertake to inform FUTURA Pension Fund of any changes in marital status, changes of address of the beneficiaries and other changes that may affect entitlement to benefits.

I acknowledge:

- The validity of this special order of beneficiaries shall not be determined by the current circumstances or the current regulations and statutory provisions but by those at the time of death.
- In the case of objections to this beneficiary declaration, FUTURA Pension Fund will deposit the insurance benefit under discussion in court when it becomes due.

Place and date \_\_\_\_\_ Signature of the insured party (notarised by a notary/municipality)

## Recognition of the beneficiary declaration/waiver

The following people have acknowledged the beneficiary declaration in accordance with page 1 and recognise its validity:

Last name, first name

Signature

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Place and date

Notarisation

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Last name, first name

Signature

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Place and date

Notarisation

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Last name, first name

Signature

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Place and date

Notarisation

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Place and date

Signature of the insured party

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## **Order of beneficiaries** pursuant to Article 6.6 of the pension plan regulations

The people listed below are entitled to the full lump-sum death capital, irrespective of the law of succession:

- a) The spouse of the insured party;  
in the absence of such person
- b) The children eligible to receive children's benefit pursuant to section 11.7;  
in the absence of such persons
- c) The natural persons who were supported to a substantial extent by the insured party or the unmarried person with whom the unmarried insured party has continuously been in a life partnership for the last five years until the insured party's death;  
in the absence of such persons
- d) The remaining children of the insured party;  
in the absence of such persons
- e) The parents or siblings of the insured party.

Persons who draw a spouse's pension or a partner's pension from a domestic or foreign pension fund are not entitled to the lump-sum death capital.

If none of the persons specified under a to e exist, half the lump-sum death capital or the contributions paid in by the insured party, if higher, will be paid to the remaining legal heirs in equal shares, excluding public bodies.

Any lump-sum death capital not paid out shall pass to the Foundation.

The lump-sum death capital is not included in the deceased person's estate.

The insured party can make an assignment in a beneficiary declaration that differs from the order according to b to e if this better fulfils the object of the pension and any persons preceding the beneficiary/beneficiaries in the order of precedence have signed a waiver notarised officially or by a notary in favour of the inserted person(s). The insured party's signature must be officially notarised on the beneficiary declaration. Beneficiary declarations submitted by 31/12/2019 remain valid even without official notarisation of the insured party's signature. The insured party can revoke the special arrangement in writing and with official notarisation at any time. There is no entitlement under the law of succession. The benefits will accrue to the beneficiaries even if they renounce the inheritance.

If the insured party has not defined the division among several beneficiaries of the same category in the beneficiary declaration, the division will be made in equal shares.