

Order of beneficiaries for pillar 3a retirement savings account

Account no.:

Accountholder's details:

First name:

Last name:

Date of birth:

Street / No.:

Postcode / Town:

Marital status:

In the event of his or her death, the accountholder hereby specifies, in accordance with the legal framework, the order of beneficiaries and their entitlements.

In doing so, Art. 2 of the Swiss Federal Ordinance on the Tax Deduction of Contributions to Recognised Pension Plans (BVV3) of 13 November 1985 and Art. 9 of the Swissquote Pillar 3a Regulations must be taken into account:

- 1) The following individuals are recognised as beneficiaries:
 - a. In the event of survival, the accountholder;
 - b. In the event of the death of the accountholder, the following persons in the order specified below:
 1. the surviving spouse or registered partner,
 2. the direct descendants and any natural persons who were supported to a significant degree by the deceased person, or the person who was living with the accountholder in a permanent domestic relationship for the last five years immediately prior to his or her death, or who is responsible for maintaining one or more joint children,
 3. the parents,
 4. the siblings,
 5. other heirs.
- 2) The accountholder may designate one or more beneficiaries among the beneficiaries named in paragraph 1b note 2 and specify their entitlements more detailed.
- 3) The accountholder has the right to alter the order of the beneficiaries as stated in paragraph 1b notes 3-5 and specify their entitlements more detailed.

New order of beneficiaries:

Last name and first name	Date of birth	Address	Relationship to accountholder	Share of benefits (in % or CHF)
1.				
2.				
3.				
4.				

With this declaration the accountholder revokes all previously made changes to the order of beneficiaries.

In order to ensure that the entitlements can be exercised in the event of the accountholder's death, Swissquote Bank may request further documents as evidence such as the death certificate, will, certificate of inheritance, family book, confirmation of residence, rental agreement, etc. at the appropriate time.

The validity of the order of beneficiaries depends on the circumstances and legal situation at the time of death and not at the time that the form was completed.

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Place, Date

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Signature of accountholder

Please send this document with a legally valid signature together with a copy of the identity card of the accountholder to: Swissquote Bank, Central Data, Chemin de la Crétaux 33, P.O. Box 319, CH-1196 Gland.