

Amendment to the General Order of Beneficiaries

1. Personal Data

Agreement no.	
Employer	
Last name, first name	
Address	
Date of birth	
Gender	<input type="checkbox"/> female <input type="checkbox"/> male
Social security 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 <input type="checkbox"/> dissolved partnership

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 Credit Suisse Collective Foundation 1e by the insured 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 Credit Suisse Collective Foundation 1e 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/recipient of a disability pension, the Credit Suisse Collective Foundation 1e 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 Credit Suisse Collective Foundation 1e 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 recipient of a disability pension revokes all "Amendment to the General Order of Beneficiaries" forms previously submitted to the Credit Suisse Collective Foundation 1e.
- 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 Credit Suisse Collective Foundation 1e 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.

3. Acknowledgment of Receipt

The Credit Suisse Collective Foundation 1e will provide acknowledgment of receipt of the form within 30 days. If you have not received such acknowledgment within this period, please contact the Credit Suisse Collective Foundation 1e.

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 article 31 paragraph 2 and 5 of the Regulations of the Credit Suisse Collective Foundation 1e:

	Beneficiaries ^{1,3}		Share in % ²
	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.			

¹ 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.

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

³ 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 article 31 of the Regulations of Credit Suisse Collective Foundation 1e.

Place, date

Signature of the insured/pension recipient

Please send the form, duly signed, to
Credit Suisse Collective Foundation 1e
Office Swiss Life Pension Services AG
P.O. Box
8022 Zurich

verwaltung1e@slps.ch
Telephone 058 311 22 10