

## Partner registration

This form is used to register a partner as a beneficiary pursuant to Art. 45 para. 3 of the Pension Fund Regulations. To amend an existing order of beneficiaries, please complete the "Amend the order of beneficiaries" form.

### 1. Insured person

Company

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Surname

First name

---

Street, no.

---

Postcode/City/Country

---

Date of birth

SI number 756.

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Tel. no.

E-mail

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Civil status

single

married

divorced

registered partnership

dissolved partnership

widowed

### 2. Partner

Mr

Ms

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Surname

First name

---

Street, no.

---

Postcode/City/Country

---

Date of birth

SI number 756.

---

Tel. no.

E-mail

---

Civil status

single

married

divorced

registered partnership

dissolved partnership

widowed

### 3. Details of your cohabitation

Common household since

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Cohabiting relationship since

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Shared children?

yes

no

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Surname

First name

SI number 756.

#### 4. Confirmation and signature

I confirm that:

- I am not related to my partner
- My partner and I are not married and we are not in a registered partnership

I am aware that the regulatory and legal provisions at the time of my death shall be definitive, and not the current circumstances.

In the event of my death, my partner shall be entitled to benefits, provided we are in a qualifying partnership in accordance with the Pension Fund Regulations at the time of my death.

This registration is valid from the date of confirmation by the pension fund until revoked. This registration shall be terminated in the event that I leave the occupational pension scheme.

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Place, date

Insured person's signature

## Partner information sheet

### Purpose of the partner's pension

Unmarried persons do not have sufficient protection in the event of death. Unlike married and registered partners, mandatory social insurances do not provide benefits to unmarried partners if they lose a source of earned income as a result of a death. This is felt particularly severely in cases where one partner predominately raises children and the other is in paid employment. A partner's pension from the occupational pension scheme protects the surviving partner by providing them with a regular income.

### Equal treatment of cohabiting couples

If a partner's pension is also insured under the pension plan, cohabitation shall be considered equivalent to a marriage or registered partnership, if the insured person, or person in receipt of an old-age or invalidity pension, so desires.

The partner must be registered with the occupational pension scheme while the insured person is still alive. They shall then be entitled to a partner's pension provided certain conditions are met. The partner can be of the same or a different sex.

### Conditions

The following conditions must have been cumulatively met:

- the partner must be registered in writing with the occupational pension scheme while the insured person is still alive; and
- neither partner may be married and the two must not be related; and
- the partner must have been living with the insured person continuously for the five years prior to the insured person's death, or have to provide for the maintenance of one or more children for whom they were jointly responsible, and
- the surviving partner must not already be in receipt of a survivor's pension from the OASI/IV scheme or from a 2nd pillar occupational pension scheme from a previous marriage, registered partnership or cohabitation, and must not have claimed capital benefits in lieu of such a pension.

### Amount of the partner's pension

The amount of the partner's pension corresponds with the amount of the spouse's pension.

### Claiming the partner's pension

A written application to claim a partner's pension must be submitted to the occupational pension scheme within three months of the death of the insured person at the latest.

### Expiration of entitlement to a partner's pension

Entitlement expires at the end of the month in which the person claiming the partner's pension

- marries; or
- enters a new partnership (registered partnership or cohabiting relationship); or
- dies

### Required documents in the event of death

The documents may be **no more than three months old**.

- Copy of the death certificate
- Copies of the civil status certificates for the deceased and the surviving partner
- Copy of a confirmation of shared children (family booklet or declaration of acknowledgement)
- Copy of the rental or purchase contract or certificate of residence
- Supporting documents as requested by the occupational pension scheme