

# Information for drawing death benefits

## 1. Details of the deceased person

Company

Surname

First name

Date of birth

AHV/AVS number

Civil status

single

married

divorced

registered partnership

dissolved partnership

widowed

## 2. Details of surviving spouse or registered partner

Surname

First name

Street, no.

Postcode/City/Country

Date of birth

AHV/AVS number

Tel. no.

E-mail

## 3. All children of the deceased

There is an entitlement to claim an orphan's pension for children who:

- a) have not yet reached the age of 18
- b) are still in education and have not yet reached the age of 25
- c) are at least two thirds disabled and have not yet reached the age of 25

➔ For children who fall under b) and c), please provide documentation such as a copy of an apprenticeship contract, proof of student status, copy of the invalidity insurance policy, etc.

|          | Surname | First name | Date of birth | In education |    |
|----------|---------|------------|---------------|--------------|----|
| 1. child |         |            |               | yes          | no |
| 2. child |         |            |               | yes          | no |
| 3. child |         |            |               | yes          | no |
| 4. child |         |            |               | yes          | no |
| 5. child |         |            |               | yes          | no |

Surname First Name

AHV/AVS number

#### 4. Details of other people expected to be entitled to benefits and not listed under point 2 and/or point 3

Surname First name

Street, no.

Postcode/City/Country

Date of birth AVS number

Tel. no. E-mail

Surname First name

Street, no.

Postcode/City/Country

Date of birth AVS number

Tel. no. E-mail

If any other people are expected to be to be entitled to benefits, please list them on a separate sheet.

#### 5. Tax obligation self-declaration

Surname, first name I am liable to pay tax:

in Switzerland in the following country

I undertake to inform the occupational pension scheme immediately should the location of my tax obligation change before the payment date.

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If any other people are expected to be to be entitled to benefits, please list them on a separate sheet.

Surname

First name

AHV/AVS number

## 6. Required documents

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

### For all deceased people

- ➔ Death certificate ("Form 2.2.2 Civil Status").  
You can obtain the "2.2.2 Civil Status" form from the civil register office at the place of death

### Deceased person is single or widowed and has no partner and no children who are entitled to a pension

- ➔ Certificate of inheritance or a legal document (e.g. decision on the opening of a will)

### Deceased person has left behind a spouse, registered partner or children

- ➔ Copy of the family booklet (pre-2006 version) updated to include the date of death, including the children's pages, or  
family booklet (new version) ("7.4 Civil Status" form).

Family booklet (pre-2006 version):

The old version of the family booklet was issued to couples getting married up until 2005 and provides information about the dates of birth of the spouses and any children from the marriage, as well as the civil status of the insured person before their marriage. We require this information in order to clarify any benefit entitlements for divorced ex-spouses.

Family booklet (new version):

The new version of the family booklet ("7.4 Civil Status" form) replaced the previous version of the family booklet in 2006. Unfortunately, it does not contain the insured person's civil status before their current marriage. For this reason, we require a separate confirmation of civil status before marriage in addition to the family booklet.

- ➔ Copy of federal OASI/IV policy
- ➔ Proof of children's educational status (in accordance with point 3)

### Deceased person has left behind a partner

- ➔ Proof from the municipality of the amount of time spent living together

### In the event of death by accident

- ➔ Copy of accident insurance policy or name and address of accident insurer

## 7. Payment address(es) and signature(s) for any death benefits

Surname, first name

Name and address of bank/Post Finance

IBAN:

SWIFT (for foreign banks only):

Surname, first name

Place, date

Signature

Surname

First name

AHV/AVS number

Surname, first name

Name and address of bank/Post Finance

IBAN:

SWIFT (for foreign banks only):

Surname, first name

Place, date

Signature

If any other people are expected to be entitled to benefits, please list them on a separate sheet.