

## Pictet Vested Benefits Foundation (2nd Pillar)

### Designating beneficiaries in the event of death

Please complete in block capitals and send the original form to:  
Pictet Vested Benefits Foundation (2nd Pillar) – Route des Acacias 60 – 1211 Geneva 73

Should you need any assistance, please do not hesitate to contact us:  
Tel. 058/323.29.20 – E-mail: [pension@pictet.com](mailto:pension@pictet.com)

Account no.:

**Account holder**       Mrs       Mr

Last name: \_\_\_\_\_ First name(s): \_\_\_\_\_

Date of birth: \_\_\_\_\_ Marital status: \_\_\_\_\_

Home/mobile tel.: \_\_\_\_\_ Work tel.: \_\_\_\_\_

In the event of my death, I designate the beneficiary or beneficiaries in the order set out below in accordance with art. 12 of the regulations and specify their respective entitlements in the following order:

a) Last name and first name(s) of spouse/registered partner: \_\_\_\_\_

Date of birth: \_\_\_\_\_ Share in %: \_\_\_\_\_

Only for minor children and adult children aged less than 25 years and still in education (art. 20 LPP):

Last name and first name(s): \_\_\_\_\_

Date of birth: \_\_\_\_\_ Share in %: \_\_\_\_\_

Last name and first name(s): \_\_\_\_\_

Date of birth: \_\_\_\_\_ Share in %: \_\_\_\_\_

Last name and first name(s): \_\_\_\_\_

Date of birth: \_\_\_\_\_ Share in %: \_\_\_\_\_

Last name and first name(s): \_\_\_\_\_

Date of birth: \_\_\_\_\_ Share in %: \_\_\_\_\_

b) Persons for whom the deceased account holder provided substantial maintenance, or the person with whom he/she has lived with for an uninterrupted period of 5 years immediately before death, or persons who must provide the maintenance of one or more children born to both of them:

*A person in category b) may be included in category a)*

Last name and first name(s): \_\_\_\_\_

Date of birth: \_\_\_\_\_ Relationship to the account holder: \_\_\_\_\_

Include in category a)      Yes       No       Share in %: \_\_\_\_\_

Last name and first name(s): \_\_\_\_\_

Date of birth: \_\_\_\_\_ Relationship to the account holder: \_\_\_\_\_

Include in category a) Yes  No  Share in %: \_\_\_\_\_

c) **By default**, any children who do not meet the conditions of article 20 LPP, parents or brothers and sisters:

Last name and first name(s): \_\_\_\_\_

Date of birth: \_\_\_\_\_ Relationship: \_\_\_\_\_ Share in %: \_\_\_\_\_

Last name and first name(s): \_\_\_\_\_

Date of birth: \_\_\_\_\_ Relationship: \_\_\_\_\_ Share in %: \_\_\_\_\_

Last name and first name(s): \_\_\_\_\_

Date of birth: \_\_\_\_\_ Relationship: \_\_\_\_\_ Share in %: \_\_\_\_\_

Last name and first name(s): \_\_\_\_\_

Date of birth: \_\_\_\_\_ Relationship: \_\_\_\_\_ Share in %: \_\_\_\_\_

d) **By default**, the remaining legal heirs, with the exception of public entities:

Last name and first name(s): \_\_\_\_\_

Date of birth: \_\_\_\_\_ Relationship: \_\_\_\_\_ Share in %: \_\_\_\_\_

Last name and first name(s): \_\_\_\_\_

Date of birth: \_\_\_\_\_ Relationship: \_\_\_\_\_ Share in %: \_\_\_\_\_

Last name and first name(s): \_\_\_\_\_

Date of birth: \_\_\_\_\_ Relationship: \_\_\_\_\_ Share in %: \_\_\_\_\_

Last name and first name(s): \_\_\_\_\_

Date of birth: \_\_\_\_\_ Relationship: \_\_\_\_\_ Share in %: \_\_\_\_\_

Date: \_\_\_\_\_ Signature of the account holder: \_\_\_\_\_

Pursuant to article 12 of the regulations of the Foundation, the following persons qualify as beneficiaries:

- a. In the event of survival, the accountholder himself;
- b. In the event of the accountholder's death, the following persons are deemed the beneficiaries in the following order:
  1. survivors within the meaning of articles 19, 19a and 20 LPP;
  2. persons whose maintenance was largely provided by the accountholder, or who have been cohabiting with the account holder for an unbroken period of at least five years immediately prior to the accountholder's death, or who has to provide for the maintenance of one of more joint children;
  3. children of the deceased who do not meet the conditions set forth by article 20 LPP, parents or brothers and sisters;
  4. the remaining legal heirs, with the exception of public entities.

The accountholder may specify the rights of each of the beneficiaries at any time. The accountholder may include among the beneficiaries mentioned under letter b, lit. 1 those persons mentioned in lit. 2, by sending written instructions thereof to the Foundation. If this has not been done, the accountholder's assets will be paid to the beneficiaries in equal shares.

The pension fund member must, during their lifetime and in writing, inform the Foundation of the names of the persons specified under letter b, lit. 2.

If no beneficiary is designated or the beneficiary is not designated in accordance with the provisions set forth under letter b, the Foundation will apply the general beneficiary clause mentioned in letter b.

N.B.: The order of the beneficiaries as set forth by occupational pension law is totally independent from the provisions of succession law that apply to all your other assets (art. 457 to 466 of the Swiss Civil Code).