

Payout of Pillar 3a savings in the event of death

In the event of death, the 3a capital is paid out in accordance with the order of beneficiaries laid down by law (Art. 2 BVV 3). The retirement savings are not an inheritance-law benefit and therefore do not form part of the estate.

The groups of persons are entitled in the following order. If there are several beneficiaries within the same group, the capital is divided into equal shares.

- Group 1** Surviving spouse or surviving registered partner
- Group 2** Direct descendants as well as the natural persons who were supported to a considerable extent by the deceased person, or the person who lived in an uninterrupted cohabitation with the deceased during the last five years up to their death or who must provide for the maintenance of one or more joint children
- Group 3** Parents
- Group 4** Siblings
- Group 5** Remaining heirs (according to the certificate of inheritance); the public authority is excluded

Details of the deceased pension plan member

First name		Last name	
Street, no.		Zip Code, Town	
Date of birth		Client no.	
AHV no.		Marital status	

Documents to be enclosed

Please enclose the following documents. Copies are entirely sufficient. It is best to keep your originals yourself, as we do not return submitted documents.

- Official identification of the beneficiaries or their legal guardians
- Certificate of inheritance

- Certificate of the registered marital status of the deceased pension holder (issued after the date of death), or, if the marital status was married or in a registered partnership, the death certificate
- Certificate of executor
- In the case of a disclaimer of inheritance, the record of the disclaimer of inheritance

Depending on the beneficiaries, the following additional documents must be enclosed

Life partner	Confirmation of registration from the residents' registration office of the municipality of residence of both persons (the deceased and the surviving partner) covering the last five years up to the death, and the cohabitation agreement
Parents	Certificate of the registered marital status of the deceased person (issued after the date of death) or birth certificate
Siblings	Certificate of the registered marital status of the parents

Notes

Prior to payout, the beneficiaries must check with any pledgee whether the retirement savings are still pledged. If they are pledged, the pledgee must release the pledge. A copy of the release of pledge must be submitted without fail. Without release of the pledge, the payout cannot be carried out.

Until we are in possession of the form and have processed it, the securities remain invested in the investment strategy chosen by the deceased pension holder.

Following successful review of the completeness of the documents, any securities are sold on the next weekly trading day. The payout is then made with a processing period of 5 working days. If the assets are already held in cash, the payout can also be made more quickly.

Details of the beneficiaries

Number of beneficiaries:

Beneficiary 1

First name		Last name	
Street, no.		Zip Code, Town	
Country		Date of birth	
AHV no.		(Degree of) relationship	

Bank details

Name of the bank	
IBAN	
Name of the beneficiary	
Address of the beneficiary	

Beneficiary 2

First name		Last name	
Street, no.		Zip Code, Town	
Country		Date of birth	
AHV no.		(Degree of) relationship	

Bank details

Name of the bank	
IBAN	
Name of the beneficiary	
Address of the beneficiary	

Beneficiary 3

First name		Last name	
Street, no.		Zip Code, Town	
Country		Date of birth	
AHV no.		(Degree of) relationship	

Bank details

Name of the bank	
IBAN	
Name of the beneficiary	
Address of the beneficiary	

Beneficiary 4

First name		Last name	
Street, no.		Zip Code, Town	
Country		Date of birth	
AHV no.		(Degree of) relationship	

Bank details

Name of the bank	
IBAN	
Name of the beneficiary	
Address of the beneficiary	

Beneficiary 5

First name		Last name	
Street, no.		Zip Code, Town	
Country		Date of birth	
AHV no.		(Degree of) relationship	

Bank details

Name of the bank

IBAN

Name of the beneficiary

Address of the beneficiary

Signatures

Place, date

Signature beneficiary 1

Place, date

Signature beneficiary 2

Place, date

Signature beneficiary 3

Place, date

Signature beneficiary 4

Place, date

Signature beneficiary 5