

Pictet Individual Pension Foundation (3rd Pillar A)

Designating beneficiaries in the event of death

Please complete in block capitals and send to:

Pictet Individual Pension Foundation (3rd Pillar A) – Route des Acacias 60 – 1211 Geneva 73

Should you need any assistance, please do not hesitate to contact us:

Tel. 058/323.29.60 – E-mail: pictetfoundations@pictet.com

Account no.:

Account holder Mrs Mr

Last name: _____ First name(s): _____

Date of birth: _____ Marital status: _____

Home tel./mobile: _____ Work tel.: _____

In the event of my death, I designate the beneficiary or beneficiaries in the order set out below in accordance with art. 13 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: _____

b) **By default**, the beneficiary or beneficiaries pursuant to art. 13, point 2, lit. b of the regulations (see page 2):

Direct descendants:

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 %: _____

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:

Last name and first name(s): _____

Date of birth: _____ Share in %: _____

Last name and first name(s): _____

Date of birth: _____ Share in %: _____

c) **By default**, the parents (lit. c), brothers and sisters (lit. d) and other heirs (lit. e):

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 parents (lit. c), brothers and sisters (lit. d) and other heirs (lit. e):

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 %: _____

e) **By default**, the parents (lit. c), brothers and sisters (lit. d) and other heirs (lit. e):

Last name and first name(s): _____

Date of birth: _____ Relationship: _____ Share in %: _____

Last name and first name(s): _____

Date of birth: _____ Relationship: _____ Share in %: _____

Place and date: _____ Signature: _____

As per article 13 of the Regulations of the Foundation, the following persons shall be deemed to be 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. the surviving spouse or surviving registered partner;
 - 2. direct descendants or persons whose maintenance was largely provided by the accountholder, or who have been cohabiting with the accountholder 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. the deceased's parents;
 - 4. the deceased's siblings;
 - 5. other heirs.

The accountholder may designate, during their lifetime and in writing, one or more beneficiaries from among the persons mentioned in letter b, lit. 2, and determine their entitlements. If this has not been done, the accountholder's assets will be paid to the beneficiaries in equal shares.

The accountholder may alter, in writing, the order of beneficiaries mentioned in letter b, lit. 3 to 5, and determine their entitlements. If this has not been done, the accountholder's assets will be paid to the beneficiaries in equal shares.

The accountholder must, during their lifetime and in writing, provide the Foundation with the names of the persons indicated under letter b, lit. 2, whose support and maintenance was largely the responsibility of the accountholder.

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 of the Swiss Civil Code).