PensUnit

Pensions Order of Beneficiaries for non-registered Life Partners

This form must be submitted in the original.

Personal details of the insured person:

Employer: ..... Contract: .....

Surname: ..... First name: .....

Street, no.: ..... Postcode/Town: .....

Date of birth: ..... Civil status: .....

The PensUnit Pension Fund Regulations provide for the following Order of Beneficiaries:

16.9 Non-registered life partners – including same sex partners – are entitled to a life partner pension and are treated the same as surviving spouses, provided that;

a) a written confirmation of beneficial interest has been received and
b) both partners are unmarried, are not living in a registered partnership and they are not related and
c) evidence is provided that the partner has lived in a permanent and exclusive relationship with the deceased insured person as a couple for at least five years, or if the partner was responsible for supporting one or more joint children in accordance with Art. 16.10 and 16.11 and
d) a corresponding application was submitted to the Foundation no later than three months after the death of the insured person and
e) the beneficiary on the date of death is not in receipt of a widow's or widower's pension or life partner pension from the occupational pension provision.

The entitlement to a life partner pension expires at the end of the month during which the beneficiary dies, marries, registers a new partnership, enters a new life partnership or a settlement lump sum becomes payable. The provisions of the spouse's pension shall also apply to the life partner's pension.

16.10 If an insured person dies, each child eligible for a pension - if provision has been made in the pension plan – will be entitled to an orphan's pension. The entitlement is established with the death of the insured person or pension recipient, no earlier however than at the end of the continued payment of salary in full or expiry of the entitlement to a disability pension.

16.11 The orphan's pension is payable for the life of the child, no later however than when the child reaches his 20th birthday. If the child has reached or exceeded this age, the entitlement to a pension still applies whilst the child continues in education without being simultaneously primarily gainfully employed, no later however than up to his 25th birthday.

I favor the following person as my non-registered life partner:

Surname: ..... First name: .....

Street, no.: ..... Postcode/Town: .....

Date of birth: .....

Signature:

This declaration revokes all declarations of beneficial interest issued previously to PensUnit within the context of occupational pension provision. The insured person acknowledges that it is not the current situation or the current regulatory and legal provisions that is/are definitive for the validity of this declaration but that/those at the date of death.

This declaration of beneficial interest can only be submitted by persons who are insured with the Collective Foundation PensUnit and only during the corresponding period of insurance. In the event of a change to a new employer or a new pension institution, their respective Pension Plan Regulations shall apply.

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Place, date **Signature of the insured person**

11/2025

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