|  |  |
| --- | --- |
| Our General Terms and Conditions for Insurance Contracts apply. Providing this information in English is a special service for you. All policy documents sent to you shall be in German. All communications on your policy relationship shall also be in German.Zurück anAllianz Lebensversicherungs-AG10850 Berlin |  |
| Insurance policy number  | Policyholder  |

Name and address of the person insured

1. **Designation of beneficiary’s right**

**Applicable to occupational pension plans implemented through company direct insurance and Pensionskasse with tax incentives in accordance with § 3 (63) EStG (Income Tax Act) and § 10 a EStG with commencement of insurance as of January 01, 2005**

If benefits in the event of death of the person insured become due, the following person(s) will be the revocable beneficiary(ies):

– **The spouse living in legal marriage** with the deceased person insured **or the registered partner;**

*Designation by name cannot be made.*

– In the absence of a spouse or registered partner, your **children** within the meaning of § 32 (1) no. 1 EStG

 (first-degree children and those having the same status) to the extent they meet therequirements of § 32

 (3) and (4) clause 1 no. 1 to 3 *EStG* and, in case of § 32 (4) clause 1 no. 3 EStG, have not yet completed

 age 25;

*If the children do no longer meet the requirements of § 32 EStG, it is possible to name them as persons entitled to the death grant*

Children who live in your household permanently and are designated by name in the pension agreement are considered to be of equal status, provided they meet the further requirements stated in the terms and conditions of insurance;

*A separate declaration is required. Please contact us, we will gladly advise you.*

– In the absence of children, the **companion/same-sex non-registered partner** designated by name towards the pension provider based on a declaration (cf. II. below) before occurrence of the event insured, provided he/she meets the requirements stated in the terms and conditions of insurance;

*Consensual union/non-registered partnership means:*

*Two persons between whom marriage would be legally possible are living in a common household.*

– In the absence of a companion/same-sex non-registered partner, your **grandchildren** if they are living in

 your household and are provided for on a permanent basis, provided they meet the requirements of § 32 (3)

 and (4) clause 1 no. 1 – 3 and, in case of § 32 (4) clause 1 no. 3 EStG, have not yet completed

 age 25;

*A separate declaration is required. Please contact us, we will gladly advise you.*

1. **Possible additional declarations**

If you do not wish that the spouse/registered partner becomes a beneficiary,



please tick off here

If you wish that the children within the meaning of § 32 (3) and (4) clause 1 no. 1 – 3 EStG

are to be named first in the beneficiary precedence order,

please tick off here

Designation of companion / same-sex non-registered partner (for the first time or altered designation)

First name, last name Address

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Date of birth . .

If you wish that the companion/ same-sex non-registered partner designated by name is to precede the children within the meaning of § 32 (3) and (4) clause 1 no. 1 – 3 EStG,

please tick off here

If you wish that the companion/ same-sex non-registered partner designated by name should no longer be a beneficiary, please tick off here



**III. Disposition regarding the death grant**

PESVA03391

If none of the above persons exist and a death grant will be paid, the persons entitled to the death grant designated by name towards the pension provider and the policyholder, if none, the heirs, are entitled to benefits.

Person(s) entitled to the death grant Address

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Date of birth |  | . |  | . |  | Share  | % |
|  |  |  |  |  |

Person(s) entitled to the death grant Address

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Date of birth  |  | . |  | . |  | Share  | % |
|  |  |  |  |

Person(s) entitled to the death grant Address

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Date of birth |  | . |  | . |  | Share  | % |
|  |  |  |  |  |

*The persons entitled to the death grant are entitled in equal shares, unless otherwise stated above. If you state several shares, please note that the total of shares must equal 100%.*

If you wish that the previous person(s) entitled to the death grant should no longer be entitled, please tick off here.

If you remove the person(s) entitled to the death grant, the heirs of the person insured will again become the beneficiaries of the death grant.

All previous designations of beneficiary’s rights and disposition regarding the death grant shall be replaced by this declaration. In all other respects, the insurance promise shall remain unchanged.

The designation of beneficiary’s rights and disposition regarding the death grant can be revoked at any time until occurrence of the event insured.

Place, date Policyholder signature Signature

and stamp Person insured

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