

Entitlement to a partner's pension

(Same or other sex) partners are entitled to a partner's pension subject to conditions and reduction provisions analogous to spouse's pensions (paragraphs 15.1 to 15.3 of the Framework Regulations).

Partners are entitled to a partner's pension in the amount of the spouse's pension provided:

- the partner and the member or pension recipient are not married (either to each other or to a third person) and there are no impediments to marriage
- the partner and the member or pension recipient are not in a registered partnership (either with each other or a third person)
- the partner does not receive a widow's, widower's or partner's pension from a 2nd pillar employee benefits institution
- the partner and the deceased member
 - were in a life partnership and cohabited in a joint household for a minimum of five years directly before the death, and evidence of this fact can be provided, or
 - cohabited in the same household at the time of the death and the partner is responsible for the maintenance of one or several joint children who are entitled to an orphan's pension under the Regulations

The life partnership must have been established both before retirement and before retirement age has been reached.

Claims to partner's pensions must be asserted at the Foundation in writing within three months of the death.

Member's or pension recipient's details

Surname and first name _____

Street _____

Post code, town, country _____

Social insurance no. _____ Date of birth _____

Sex _____ Marital status _____

Employee benefits unit / company _____

Executive pension scheme

Partner's details (optional submission during lifetime)

Surname and first name _____

Street _____

Post code, town, country _____

Social insurance no. _____ Date of birth _____

Sex _____ Marital status _____

Joint household since (month/year) _____ Joint children Yes No

The entitlement to a partner's pension does not automatically establish a claim to a lump-sum death benefit.

Entitlement to the lump-sum death benefit

- Entitlement pursuant to the 2018 Framework Regulations, paragraph 16.2, b)

The partner's claim to the lump-sum death benefit must be registered in writing during the member's lifetime using the separate '*Beneficiaries of lump-sum death benefit*' form. This also applies to other beneficiaries in beneficiary group b).

If there is more than one individual in beneficiary group b), the member may use the same form to determine the shares of the lump-sum death benefit each of these persons shall be entitled to. Otherwise, the lump-sum death benefit will be divided equally.

- Entitlement pursuant to the 2018 Framework regulations, paragraph 16.2, c), d)

In the case of beneficiaries in groups c) or d), the separate '*Beneficiaries of lump-sum death benefit – change of order*' form does not need to be completed unless different shares are determined within the same group and/or the order in group c) is changed.

The maximum share per beneficiary group is 100%. Beneficiaries in the preceding beneficiary group exclude all claims held by the subsequent beneficiary group.

Declaration

I hereby take note that the personal circumstances and the current Regulations apply to the assessment of entitlements in the event of death.

This declaration is valid from the date of confirmation until it is revoked. The entitlement is forfeited upon departure from the GEMINI Collective Foundation 1e.

Place, date _____ Member's signature _____