

Special beneficiary provision for Occupational group life insurance (TGL)

Applies to the agreement area Svenskt Näringsliv (Confederation of Swedish Enterprise) and PTK (the council for negotiation and cooperation).

Name and address in the population register:	Personal identity number (YYYYMMDD-XXXX):
	Employer:
	Employer's business registration number:

You can only select one of the four options below. Read the information on the next page before you choose which option to fill in.

☐	Option 1	If you want your beneficiary to be your spouse or registered partner in the first instance . The beneficiaries in the second instance will be your children, and then your parents. If your parents are no longer living, the benefit will go to your siblings, your nieces and nephews, your grandparents or your parents' siblings. Do not enter their names or personal details.																								
☐	Option 2	If you want your cohabitant to be your beneficiary in the first instance . A cohabitant ('sambo') is a partner you live with who you are not married to or in a registered partnership with. The beneficiaries in the second instance will be your family members, in the following order of priority: your spouse or registered partner, then your children, and then your parents. My cohabitant's name: My cohabitant's personal identity number:																								
☐	Option 3	If you want different beneficiaries from options 1, 2 or 4 , or if you want the amount to be distributed in a different way. My beneficiaries in the first instance are: * <table border="1"> <thead> <tr> <th>First and last name</th> <th>Personal identity number (YYYYMMDD-XXXX)</th> <th>Relationship to me</th> <th>Percentage per person</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table> My beneficiaries in the second instance are: * <table border="1"> <tbody> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table> * If there are not enough lines or if you want to add third and fourth levels of beneficiaries, you can write your wishes on a separate piece of paper and send it to us with this form.	First and last name	Personal identity number (YYYYMMDD-XXXX)	Relationship to me	Percentage per person																				
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☐	Option 4	I want the general beneficiary provision to apply again . (There is more information about this on the next page.)																								

Private property

If you want the payment to the beneficiary to be counted as their private property, choose 1 or 2 below. There is more information about private property on the next page.

- ☐ 1. The insurance payment is to be the beneficiary's private property.
- ☐ 2. The insurance payment is to be the beneficiary's private property. The beneficiary has the right to make it joint property in a marriage contract or registered partnership contract (äktenskapsförord or partnerskapsförord).

Avtalat will register the provision here

Registered by:

Signature

I have marked the option I want to select. If this provision cannot apply after my death, the provision in the insurance terms and conditions will apply instead.

Date (YYYY-MM-DD):	Signature:	Daytime phone number:
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Please print the form and then sign it. Post the form to Avtalat, 103 76 Stockholm. We will send a copy to your address in the population register once the provision has been registered. Keep a copy, you may need to update the provision if your family situation changes or if you change your employer. We process your personal data in line with applicable data protection legislation. Read more at avtalat.se.

More information about beneficiaries and beneficiary provisions

You can use this form to change your beneficiary or beneficiaries. Your beneficiaries will receive payments from your Group life insurance (TGL) when you die. Choosing beneficiaries in this way is called writing a special beneficiary provision.

You can do this if

- you want someone other than the general beneficiaries to receive the money (read below about who the general beneficiaries are)
- you previously wrote a special beneficiary provision but you aren't sure which beneficiaries you named (your beneficiaries will be the ones we received and registered last).

What is a general beneficiary provision?

A general beneficiary provision decides in advance who will receive money from your insurance when you die. If you do not actively make a choice, the general beneficiary provision will apply.

Under the general beneficiary provision, your beneficiaries will be as follows, in this order of priority:

1. Your spouse or registered partner.
2. Your children.
3. Your parents or the remaining parent if one of your parents has died.

A cohabitant ('sambo') is **not** a beneficiary according to the general beneficiary provision. A cohabitant is a partner who you live with but who is not a spouse or a registered partner.

Keep this in mind when filling in the form

Please fill in your details so that we can register the provision correctly and send you a copy. We may also need to contact you. Do you need help filling in the form? Contact us and we will help you.

Options 1 to 4

You can only select one of the four options.

Option 1 – expanded general provision

This means that if any of the beneficiaries in the general beneficiary provision is missing, your siblings, your nieces or nephews, or your parents or grandparents can become beneficiaries.

Option 2 – cohabitant as beneficiary

For a cohabitant, the provision will apply if you are cohabiting at the time of your death.

Option 3 – different beneficiaries

Choose this option if you want a different beneficiary, a different order of beneficiaries or a different distribution to options 1, 2 or 4. A legal person (a limited liability company, a charity, a foundation, etc.) cannot be a beneficiary.

Option 4 – general beneficiary provision

Choose this option if you want a previous special beneficiary provision to stop applying, or if you want to be certain that the general beneficiary provision with the default beneficiaries will apply.

Private property

Private property is the property that is not divided when an estate is split in divorce, when a civil partnership is dissolved or at death. Joint property is divided equally.

You only need to mark the box under the "Private property" heading if you want the payment to your beneficiary to be private property.

Box 1: Mark this box if you want the payment from the insurance to be the beneficiary's private property.

Box 2: Mark this box if you want the payment from the insurance to be the beneficiary's private property but want the beneficiary to be able to change it to joint property at a later date.

Beneficiary provision terms and conditions

Important rules to bear in mind about beneficiaries, distribution and precedence.

The beneficiary provision may be amended by an adjustment decision if it is unfair to a spouse, registered partner or child. This means that the beneficiary provision can be changed to avoid an unfair outcome. This is stated in Chapter 14, Section 7 of the Swedish Insurance Contracts Act (FAL).

A spouse or registered partner will remain a beneficiary even if a divorce or dissolution of a partnership is in progress.

The insurance also includes a child supplement that is paid to children under the age of 20. The beneficiary provision does not apply to the child supplement.

Your biological and your adopted children have the right to inherit from you. Your stepchildren and foster children do not have the right to inherit from you. If a child has died, any children of that child become beneficiaries.

The Swedish Inheritance Code sets out the order of precedence for beneficiaries and how the payments are divided.

What happens if I change job?

A special beneficiary provision will still apply even if you change your job provided that

- your new job is within the same collective agreement area
- you start your new job immediately after your previous one
- you start your new job before the post-employment cover has run out.

If you want to keep your special beneficiary provision when you change job, we recommend that you fill in this form again and send it to us when you start your new job. That way, you can be certain that your special beneficiary provision will still apply.

What happens if I stop working or go on study leave?

The three-month post-employment cover period can be extended by a maximum of 24 months provided that you

- are unemployed and are seeking work
- are retraining or are on a course for which you are receiving a student grant
- get a new job without TGL
- are on study leave and have the right to student finance.

The extended post-employment cover will stop if you move abroad, become self-employed, reach the ordinary ITP pension age or are covered by TGL in a new job.

Which companies does the provision apply to?

The provision applies if your employer has signed a pension agreement with us within the agreement area Svenskt Näringsliv and PTK, and your TGL is with one of the following providers: Alecta, Bliwa, Folksam, Länsförsäkringar Grupplivförsäkringsaktiebolag, Movestic Livförsäkring, Gamla Livförsäkringsaktiebolaget SEB Trygg Liv, SEB Pension och Försäkring AB or Skandia Liv.

The provision does not apply to other TGL

The beneficiary provision does not apply to other TGL, for example

- government group life insurance
- insurance with AFA Livförsäkring
- insurance with KPA Livförsäkring AB.