

Special beneficiary provision if you have chosen repayment cover or family cover within ITP

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):

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

☐	Option 1 My beneficiaries are: <ul style="list-style-type: none"> in the first instance my children entitled to inherit in the second instance my spouse, registered partner or cohabitant ('sambo'). Do not enter their names or personal details.																								
☐	Option 2 My beneficiaries and their share: <ul style="list-style-type: none"> One half to my spouse, registered partner or cohabitant ('sambo'). The other half to my children entitled to inherit. If one of the parties is missing or refuses their share, the other party receives the entire payment.																								
☐	Option 3 Enter who your beneficiaries are to be. You can choose from the following: <ul style="list-style-type: none"> a spouse or former spouse a registered partner or former registered partner a cohabitant ('sambo') or former cohabitant your children, stepchildren or foster children, or children, stepchildren or foster children of any of the people above. My beneficiaries in the first instance are: * <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th style="width: 35%;">First and last name</th> <th style="width: 30%;">Personal identity number (YYYYMMDD-XXXX)</th> <th style="width: 25%;">Relationship to me</th> <th style="width: 10%;">Percentage</th> </tr> </thead> <tbody> <tr><td style="height: 20px;"></td><td></td><td></td><td></td></tr> <tr><td style="height: 20px;"></td><td></td><td></td><td></td></tr> <tr><td style="height: 20px;"></td><td></td><td></td><td></td></tr> </tbody> </table> My beneficiaries in the second instance are: * <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <tbody> <tr><td style="height: 20px;"></td><td></td><td></td><td></td></tr> <tr><td style="height: 20px;"></td><td></td><td></td><td></td></tr> </tbody> </table> <p style="font-size: small; margin-top: 5px;">* 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. Sign and date it before you send it to us, together with this form.</p>	First and last name	Personal identity number (YYYYMMDD-XXXX)	Relationship to me	Percentage																				
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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 cannot apply after my death, the provision in the insurance terms and conditions will apply instead.

Date (YYYY-MM-DD):	Signature:	Daytime phone number:

F260-005-En 2026.06

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 who your beneficiary or beneficiaries will be. Your beneficiaries will receive payments from your repayment cover or family cover 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).

The provision applies if you have chosen repayment cover or family cover, or both, for your ITP 1 or ITPK. It also applies to additional premiums and lifetime working hours pension premiums.

The provision does **not** apply to the defined benefit retirement pension in ITP 2 or to the family pension.

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:

- spouse, registered partner or cohabitant ('sambo')
- children entitled to inherit, irrespective of age.

Remember that a spouse or registered partner will remain a beneficiary even if a divorce or dissolution of a partnership is still in progress when you die. The provision will only apply to a cohabitant ('sambo') if you are cohabiting at the time of your death.

Will the provision apply if I retire or change job?

Repayment cover

Repayment cover applies even if your employment in the collective agreement area ceases. An amended beneficiary provision will apply until a new provision is registered.

Family cover

Family cover ceases to apply if you are no longer actively employed, that is if no money is being paid in for you. There is a postemployment cover period of three months and this can be extended in the event of illness.

When the employment ends, the provision will apply for 12 months unless you start a new job in the same collective agreement area.

If you start working in a different collective agreement area or submit a new beneficiary provision, the old provision will cease immediately.

Keep this in mind when filling in the form

Please fill in all 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 below.

Option 1

In the first instance, your children will be 100% beneficiaries. If there are no children, your spouse, registered partner or cohabitant ('sambo') will be the beneficiary.

Option 2

50% to your spouse, registered partner or cohabitant ('sambo') and the remaining 50% to your children. If one of the parties is no longer living or does not want to receive their share, it will automatically go to the other party.

Option 3

Use this if you want a different beneficiary, order of beneficiaries or distribution than that set out in options 1, 2 or 4.

Under the Swedish Income Tax Act, you may only choose among the people listed under option 3 on the first page to be the beneficiary.

The provision will only apply to a cohabitant ('sambo') if you are cohabiting at the time of your death.

Option 4

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 a 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.