

# CONVINCING: Your Company Pension (Direct Insurance)

## Request for quotation

Please return via E-Mail  
by 15<sup>th</sup> September 2022<sup>1</sup> at the latest:  
direktversicherung@fresenius.com

### Personal data (please print in BLOCK CAPITALS)

- female       tariff employee  
 male         non-tariff employee

- fulltime  
 part-time, \_\_\_\_\_ hours/week

\_\_\_\_\_  
Surname, given name

\_\_\_\_\_  
Date of birth

\_\_\_\_\_  
Street, house number (private)

\_\_\_\_\_  
Nationality

\_\_\_\_\_  
Zip Code, city of residence

\_\_\_\_\_  
Date of entry / Employee ID

\_\_\_\_\_  
Employer

\_\_\_\_\_  
**E-Mail-adress (private)**

\_\_\_\_\_  
**Phone number (mobile)**

### Old-age pension (without health-check)

#### Annual contribution (supplementary contribution included for tariff employees):

(For level of supplementary contribution please refer to the chart overleaf)

<input type="checkbox"/>	EUR 478.56	<input type="checkbox"/>	EUR 1,300.00	<input type="checkbox"/>	EUR 2,350.00	<input type="checkbox"/>	EUR 3,384.00*
<input type="checkbox"/>	<b>EUR 613.54</b>	<input type="checkbox"/>	EUR 1,750.00	<input type="checkbox"/>	EUR 2,700.00	<input type="checkbox"/>	EUR 5,184.00*
<input type="checkbox"/>	EUR 1,000.00	<input type="checkbox"/>	EUR 2,050.00	<input type="checkbox"/>	EUR 3,000.00	<input type="checkbox"/>	*dynamic

\* These options can be dynamic (by choosing the dynamic, contribution will adapt to yield the maximum sum which would not incur tax and social security).

#### Choice of pension plan<sup>2</sup>: (For a description of the tariff components, see the attached brochure)

- Safety-oriented pension Plan „**Perspective**“ (lump sum optional)

*Our opportunity-oriented annuity insurance policies are available to you up to a **maximum entry age of 57!** In addition to the preferred fund tariff, please also select one of the two strategy funds. Information on the different strategy funds can be found here: <https://fred.intra.fresenius.com/display/VER/Formularcenter>.*

- Opportunity-oriented pension plan „**InvestFlex**“ (lump sum optional)

- Allianz Strategy Fund Wachstum Plus IT2 EUR (international stocks fund; 100% capital asset in stocks)  
 Allianz Strategy Fund Wachstum IT2 EUR (mixed fund; 70 % capital asset in stocks)

- Opportunity-oriented pension plan „**InvestFlex Green**“ (lump sum optional)

- Allianz Dynamic Multi Asset Strategy SRI 50 IT2 EUR (mixed fund; approx. 50 % capital asset in stocks)  
 Allianz Dynamic Multi Asset Strategy SRI 75 IT2 EUR (mixed fund; approx. 75 % capital asset in stocks)

### Disability benefit (with simplified health-check)

The following additional insurance can be included with costs in the pension plan:

- Disability waiver

\_\_\_\_\_  
Place and date

\_\_\_\_\_  
Signature employee

<sup>1</sup> To allow us to forward the proposal in time, please submit your request to the insurance department by 15<sup>th</sup> September 2022 at the latest. The application deadline ends on 30<sup>th</sup> September 2022.

<sup>2</sup> If no selection is indicated by the applicant, the Allianz pension plan "Perspective" will be selected on your behalf.

### Favorable Terms

We have an agreement with Allianz, which means that you benefit from the favorable terms of a group contract. These terms no longer apply, if you leave the Fresenius group.

### Supplementary contribution chart

Own contribution (EUR)	Supplementary contribution by Fresenius (EUR)	Annual contribution total (EUR)
478.56	134.98	613.54
826.02	173.98	1,000.00
1,087.02	212.98	1,300.00
1,485.02	264.98	1,750.00
1,759.02	290.98	2,050.00
2,020.02	329.98	2,350.00
2,331.02	368.98	2,700.00
2,592.02	407.98	3,000.00
2,937.02	446.98	3,384.00

The basic amount of EUR 478.56 is available to you each year exclusively as a contribution for your pension provision. In addition, **employees covered by the collective bargaining agreement ("Tariff")** automatically receive a supplementary contribution from Fresenius, which amounts to another EUR 134.98. The more you invest in Direct Insurance, the higher is the supplementary contribution sponsored by Fresenius. For part-time employees the amounts are reduced proportionately. If you choose the annual contribution of **EUR 613.54**, there is regularly **no need to convert additional salary**, because this amount is covered by the basic amount as well as by the supplementary contribution. Please note the exceptions in the brochure attached.

**Non tariff employees are not entitled to the supplementary contribution provided by Fresenius.**

Please find further Information regarding your different options in our brochure:

