

99142029006000

Einführung oder Änderung eines technischen Geschäftsplans von Pensionskassen Genehmigung

Heruntergeladen am 25.06.2025

<https://fimportal.de/xzufi-services/102799592/B100019>

Modul	Sachverhalt
Leistungsschlüssel	99142029006000
Leistungsbezeichnung I	Einführung oder Änderung eines technischen Geschäftsplans von Pensionskassen Genehmigung
Leistungsbezeichnung II	Request approval to introduce a technical business plan to a regulated pension fund or request approval to amend a technical business plan
Typisierung	1 - Bund: Regelung und Vollzug
Quellredaktion	Bund
Freigabestatus Katalog	fachlich freigegeben (gold)
Freigabestatus Bibliothek	unbestimmter Freigabestatus
Begriffe im Kontext	
Leistungstyp	Leistungsobjekt mit Verrichtung
Leistungsgruppierung	
Verrichtungskennung	Genehmigung (6)

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SDG-Informationsbereich	Erlangung von Lizenzen, Genehmigungen oder Zulassungen im Hinblick auf die Gründung und Führung eines Unternehmens
Lagen Portalverbund	Erlaubnisse und Genehmigungen (2010400)
Einheitlicher Ansprechpartner	Nein
Fachlich freigegeben am	29.11.2022
Fachlich freigegeben durch	Federal Ministry of Finance (BMF)
Handlungsgrundlage	§ 233 (3) sentence 2 in conjunction with § 219 (3) number 1 letter b in conjunction with § 9 (2) number 2 and § 12 (1) sentence 1 VAG; § 234 (6) sentence 1, also in conjunction with § 233 (5) sentence 2, in conjunction with § 336 VAG https://www.gesetze-im-internet.de/vag_2016/_234.html https://www.gesetze-im-internet.de/vag_2016/_233.html https://www.gesetze-im-internet.de/vag_2016/_219.html https://www.gesetze-im-internet.de/vag_2016/_9.html https://www.gesetze-im-internet.de/vag_2016/_12.html https://www.gesetze-im-internet.de/vag_2016/_336.html https://www.gesetze-im-internet.de/findagebv/anlage.html
Teaser	You are a pension fund and would like to introduce or change a technical business plan? For this you need an approval.
Volltext	If you want to introduce a new technical business plan for your pension fund or change a technical business plan, you must have this reviewed and approved by the German Federal Financial Supervisory Authority (BaFin). Only then may the new or amended technical business plan be put into effect. The technical business plan contains, among other things, information on

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	• the principles for calculating premiums and technical provisions, as well as • the mathematical formulas and other calculation bases used.
Erforderliche Unterlagen	• Application for approval of the introduction or amendment of a technical business plan • New or modified technical business plan
Voraussetzungen	• You want to change a technical business plan at your pension fund that had to be approved by the supervisory authority when it was introduced, or you want to introduce a new technical business plan at your regulated pension fund. • Your pension fund is supervised by BaFin.
Kosten	Gebühr: 1.153€ https://www.gesetze-im-internet.de/findagebv/anlage.html
Verfahrensablauf	To electronically submit the application for approval of the new introduction or amendment of a business plan to BaFin, proceed as follows: • Access the reporting and publication platform (MVP Portal) of BaFin. To be able to make submissions for the "Insurance Supervision" specialist procedure, you must first register in the MVP Portal and then log in with an application for the MVP specialist procedure. For more information on using the MVP Portal, please refer to the "Information sheet on the specialist procedure for insurance supervision". • Select the specialist procedure "Insurance Supervision" and upload and submit all required documents. • Upon receipt, BaFin will review your submission. • You will receive an electronic or postal notification of your application.
Bearbeitungsdauer	1 - 3 Monat(e) BaFin will usually process your application within 1 to 3 months.
Frist	1 Monat(e) There is no deadline. The new or amended technical business plans may only be put into effect after

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	approval.
weiterführende Informationen	https://www.bafin.de/DE/DieBaFin/AufgabenGeschichte/Versicherungsaufsicht/versicherungsaufsicht_artikel.html https://www.bafin.de/SharedDocs/Downloads/DE/dl_mv_portal_handbuch.pdf?__blob=publicationFile&v=4 https://www.bafin.de/SharedDocs/Downloads/DE/dl_mv_portal_infoblatt_fachverfahren_VA.pdf?__blob=publicationFile&v=14
Hinweise	
Rechtsbehelf	• Opposition • Action for commitment
Kurztext	• Introduction or amendment of a technical business plan of pension funds Approval Regulated pension funds must obtain approval for the introduction or amendment of technical business plans • Technical business plans contain principles for calculating premiums and technical provisions mathematical formulas and other calculation bases • responsible: Federal Financial Supervisory Authority (BaFin) in the case of pension funds subject to federal supervision.
Ansprechpunkt	
Zuständige Stelle	
Formulare	Forms available: No Written form required: No Informal application possible: Yes Personal appearance required: No
Ursprungsportal	Einführung oder Änderung eines technischen Geschäftsplans von Pensionskassen Genehmigung, Einführung oder Änderung eines technischen Geschäftsplans von Pensionskassen Genehmigung