

## Nomination of Beneficiary Form

This form is used when you want to notify the Trustee of your preferences for the payment of a death benefit. Please note that this does not bind the Trustee to your nomination. If you wish the Trustee to be bound by your nomination, please use a **Binding Nomination of Beneficiary** form.

Your Full Name:

Your Address:

Your Date Of Birth:

Your Member Number:

### 1. Your Instructions

I nominate the following preferred beneficiaries:

**Beneficiary A** [Full name]:

Relationship to you:

Date of birth:

% of benefit

Postal address:

**Beneficiary B** [Full name]:

Relationship to you:

Date of birth:

% of benefit

Postal address:

**Beneficiary C** [Full name]:

Relationship to you:

Date of birth:

% of benefit

Postal address:

**Beneficiary D** [Full name]:

Relationship to you:

Date of birth:

% of benefit

Postal address:

### 2. Signatures

**MEMBER**

I acknowledge that I have read the important notes on the reverse side of this form and agree to these conditions.

Member's  
Signature:

Date:

# Important Notes about Nomination of Beneficiaries

## Read these notes before making your nomination.

1. The Trust Deed for the Fund provides for your death benefit to be paid to one or more of your dependants or to your estate at the Trustee's discretion.
2. Use this form to indicate your preferences for how you would like your death benefit to be paid.
3. Your nomination is not binding on the Trustee and your death benefit will be paid to persons to persons decided by the Trustee. That is, in making its decision, the Trustee may take into account your nomination but will not be bound by it. If you wish for the Trustee to be bound by your nomination, subject to the relevant requirements, please use a Binding Nomination of Beneficiaries form.
4. You can change your nomination at any time by informing the Trustee in writing.
5. Nominated beneficiaries may include eligible dependants or a legal representative.
6. A dependant includes your spouse or any child, or any other person who is substantially financially dependent on you at the time of your death. The superannuation and tax law definitions of dependant have been amended to include any person with whom the member has an "interdependency relationship". Two people have an interdependency relationship if:
  - (a) they have a close personal relationship;
  - (b) they live together;
  - (c) one or each of them provides the other with financial support; and
  - (d) one or each of them provides the other with domestic support and personal care.

In addition, if a close personal relationship exists but the other requirements above are not satisfied because of a physical, intellectual or psychiatric disability (eg. one person lives in a psychiatric institution suffering from a psychiatric disability), then an interdependency relationship may still exist.

For death benefits which we distribute on or after 1 July 2004, the change to the definition of "dependant" means that where binding death benefit nomination is offered you may now be able to nominate a person satisfying the definition of interdependency when making a binding death benefit nomination.

7. All percentages of benefit must add up to 100%;
8. Nominated beneficiaries may include eligible *dependants* or a legal representative. A *dependant* is a spouse, de facto spouse, or child, or anyone who is financially dependent on you at the time of your death.
9. You can nominate that the beneficiary be your Estate – to do so, simply write TO MY ESTATE in the Beneficiary A box.
10. You may revoke or change your nomination at any time by completing a new **Nomination of Beneficiaries** form.