

Binding death benefit nomination



Please complete in pen using BLOCK letters. Print 'X' to mark boxes where applicable. Form must be completed in full. Before completing form, please read important information over the page. Call AustralianSuper on 1300 300 273 if you have any questions.

Mark (x) ONE box below and follow the instructions.

- Make a binding nomination.** To change an existing nomination, or to make a completely new nomination, complete Section 1 then go to Section 2 and provide details, sign and date Section 3, and have two witnesses sign and date Section 4.
- Cancel a binding nomination.** To cancel a current nomination and not replace it, complete Section 1 then go to Section 2 and write 'Cancel Previous Nomination', sign and date Section 3, and have two witnesses sign and date Section 4.

Note: If you cancel a nomination, your death benefit will be distributed at the Trustee's discretion to your dependant or legal personal representative.



1. PERSONAL DETAILS

Surname	Mr	Ms	Mrs	Miss	Dr	Other
<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Given names	Date of birth					
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Residential address	State		Postcode			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email	Telephone (BH)	AustralianSuper membership number				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



2. BENEFICIARY DETAILS

Each nominated beneficiary must be your spouse (legal or de facto), child (including adopted or step-children), financial dependant, interdependant or the executor of your estate (as stated in your will). When you nominate your executor you should enter legal personal representative in the relationship column. See over the page for more details.

Name	% of benefit	Relationship	Residential address
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

TOTAL 100%



3. MEMBER DECLARATION

I understand that:

- my beneficiary(ies) must be my spouse, child, financial dependant, interdependant or a legal personal representative of my estate at the date of my death
- my beneficiary(ies) and I will be bound by the provisions of AustralianSuper's Trust Deed relating to binding death benefit nominations
- this binding nomination is only valid for three years from the date of receipt by AustralianSuper or any confirmation or amendment of it
- I may at any time cancel or change a binding nomination notice in accordance with AustralianSuper's procedures
- if a notice is invalid or has not been sent to the Trustee when I die, the death benefit will be determined by the Trustee at its discretion
- this declaration must be signed by me in the presence of two witnesses (who are not a nominee on this form) both of whom are over age 18
- this nomination applies to all my investments within AustralianSuper
- I have read the notes on the back of this form that sets out the terms upon which this nomination is made, and I understand that these are consistent with AustralianSuper's Trust Deed and that I may request a copy if required
- a fee of \$10 per year will be deducted from my AustralianSuper account while a binding nomination is in effect.

Member signature	<input type="text"/>	Date	<input type="text"/>
			<input type="text"/>



4. WITNESS DECLARATION

I declare that I am over age 18, I am not a beneficiary nominated on this form and the member signed this binding nomination in my presence.

Signature of witness 1	Print name	Date	Date of birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Signature of witness 2	Print name	Date	Date of birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OFFICE USE ONLY
Membership number



IMPORTANT INFORMATION

Binding death benefit nominations

To provide greater certainty about who receives your benefit when you die, you can make a nomination, which binds AustralianSuper's Trustee to pay to whom you direct (providing you are still a member of the fund when you die).

The person(s) you nominate must be any one or more of the following:

- your current spouse (including a de facto)
- your children (including step, adopted or ex-nuptial)
- any person(s) financially dependent on you
- an interdependant (see definition)
- your legal personal representative, which means the executor or administrator of your estate.

It is important to note that all your nominated beneficiaries must be alive and fall within one of these categories at the date of your death.

Interdependant

An interdependant is someone with whom you have a close personal relationship, you live with, you provide them or they provide you with financial assistance and you provide them or they provide you with domestic support and financial care. You also have an interdependent relationship if you have a close personal relationship and are unable to meet the other three requirements because one or both of you suffer from a physical, intellectual or psychiatric disability or because one or both of you were temporarily living apart.

How long is the nomination valid?

If you make a binding nomination, it will be valid for three years from the date of receipt by AustralianSuper. It is important that you update your nomination regularly to ensure that your wishes are met.

You may renew, change or cancel your nomination at any time.

If your nomination is valid, we must follow it no matter how your circumstances have changed. For example, if you nominate your husband or wife and you later separate, but have not yet obtained a divorce, your nomination remains valid and binds us unless you vary or cancel it, or it expires.

Your dependants have the right to complain to the Superannuation Complaints Tribunal (SCT) about the Trustee's decision. The SCT will review the decision and all supporting documentation and may be able to change the decision in some circumstances (for example, if the nomination had expired at the date of death).

What is a valid nomination?

To make a nomination valid, you must also follow these procedures.

Your nomination must:

- be made to us in writing on the application form over the page;
- clearly set out the proportion of the benefit to be paid to each person nominated (total must add up to 100 per cent);
- be signed and dated by you in the presence of two witnesses over the age of 18 and who are not nominated in the form;
- be signed and dated by the two witnesses in your presence at the same time as you sign;
- be sent to us (a nomination will not be valid until we receive it).

You may also wish to inform your nominated beneficiaries of your nomination.

How do I update my binding nomination?

If you want to make or cancel a binding nomination, you must follow the procedures as outlined below.

- **Make a new nomination:** If you want to make a nomination, you must write your chosen beneficiaries' details in Section 2 of the form. Your beneficiaries must be your spouse (legal or de facto), child (including adopted or step-children), financial dependant, interdependant, or legal personal representative, and the 'percentage of benefit' column must total 100 per cent. The form must be signed, dated and witnessed.
- **Cancel a nomination:** If you want to cancel a current binding nomination and not replace it, you must write 'cancel previous nomination' in Section 2 of the form. Please note that the form must still be signed, dated and witnessed to cancel a previous nomination.

We will write to you to confirm your new or cancelled nomination. We will also write to you seeking your instructions prior to the expiry of any existing nomination. You will be advised of your nomination each time we send your Member Statement, and be provided with the opportunity to update your nomination.

Additional Binding Death Benefit Nomination forms can be obtained from AustralianSuper by calling 1300 300 273.

Default option

If, at the time of your death:

- you have not made a binding death nomination, or
- your nomination has been cancelled, or
- your nomination is invalid (for example, it is not correctly signed and witnessed, it is more than three years old and has not been renewed, or any of the people nominated dies before you or no longer falls within one of the permitted categories), the Trustee of AustralianSuper will use its discretion to determine how your benefit should be paid.

Is there a fee for binding nominations?

To cover the administration cost of a binding nomination, a fee of \$10.00 per year will apply while a nomination is in force. This will be deducted from your member account.

Privacy

AustralianSuper only collects information on this form that is essential for the administration of your binding death nomination. AustralianSuper will not use the information about you, or your witnesses, for any other purpose, or pass it to any other organisations without express permission.

You should consider consulting your legal adviser before making or cancelling a binding death benefit nomination.

Our Customer Service Centre can be contacted between the hours of 8.00 a.m. and 8.00 p.m. (EST) as follows:

Phone

1300 300 273

Fax

1300 366 273

Address

GPO Box 1901 Melbourne Vic 3001