

# Making, changing or cancelling a binding death nomination

Follow these instructions to set up, change or cancel a binding nomination.

## What's a binding nomination?

A binding nomination instructs AustralianSuper how to pay your death benefit if you die.

As long as it's valid, your nomination is legally binding and we must follow it. This is why it's important to consider changing or cancelling your binding nomination if your circumstances change, so that your benefit will be paid in line with your current wishes.

## Who can I nominate?

For a binding nomination to be valid, the people you list at step 2 of this form must be (at the date of your death):

- your spouse (including de facto and same sex)
- your children (including step<sup>1</sup>, adopted or ex-nuptial of any age)
- financially dependent<sup>2</sup> on you
- an interdependant (see More about interdependants), or
- your legal personal representative, which means the executor or administrator of your estate.

You can only select one relationship per nomination.

## How long does it last?

A correctly completed binding nomination remains valid for three years from the date you sign the form. The expiry date of your binding nomination is shown on your member statement and we'll also send you a reminder before your nomination expires.

## How do I cancel my binding nomination?

You can cancel your binding nomination at any time. To cancel your nomination you need to complete steps 1, 3 and 4 of this form and return it to us.

## How do I change my binding nomination?

You can change your binding nomination at any time. To change your current binding nomination you'll need to complete and submit a new valid *Binding death benefit nomination* form. This new nomination will override your current binding nomination.

## Does it cost anything?

No. There are no fees for you to make a binding nomination.

## What if my nomination is invalid?

If your nomination is invalid, we'll consider your wishes, but will use our discretion when paying out your death benefit.

Examples of an invalid binding nomination include:

- your nomination being made more than three years ago;
- the form being incorrectly signed and witnessed; or
- the individuals nominated no longer qualifying as your dependants at the date of your death.

## More about interdependants

An interdependent relationship exists if:

- two people have a close personal relationship which involves a demonstrated and ongoing commitment to a shared life and each other's emotional support and wellbeing; and
- they live together, or are temporarily living apart; and
- one or each of them provides the other with financial support; and
- one or each of them provides the other with domestic support and personal care of a level normally provided in a close personal relationship, rather than by a mere friend or flatmate

OR

- if they don't live together or provide each other with financial support, domestic support and personal care, it's because one or both of them suffer from a disability.

Two people don't have an interdependent relationship if one of them provides domestic support and personal care to the other and is paid for this or works on behalf of another person or organisation such as a government agency, a body corporate or a benevolent or charitable organisation.

Whether your nominated beneficiaries qualify as your interdependants will be assessed when a claim is made.

## AustralianSuper will pay your death benefit in accordance with your binding nomination if it:

- is made to us in writing on the form over the page;
- nominates one or more of your dependants (at the date of your death) or legal personal representative;
- is signed and dated by two people who have witnessed you sign and date the form, are aged 18 years or over and are not nominated on the form;
- is received by us before your death; and
- has not expired before your death.

To set up or change an existing nomination, complete steps 1, 2 and 4 of this form.

To change your binding nomination to a non-binding nomination, complete steps 1, 3 and 4 of this form.



<sup>1</sup> If your nomination(s) include stepchildren, the nomination will end if/when the relationship between you and the natural parent ends. For example, upon death or divorce. They may be able to qualify as having an interdependent relationship at the time of your death.

<sup>2</sup> As defined by Superannuation law.

## Privacy Collection Statement

Please read this Privacy Collection Statement to see how AustralianSuper uses your personal information.

AustralianSuper Pty Ltd (ABN 94 006 457 987) of GPO Box 1901, Melbourne, Victoria, 3001, collects your personal information (PI) to operate, and administer your super account (including insurance) or retirement income account, improve our products and services and keep you informed. If we can't collect your PI we may not be able to perform these services. PI is collected from you but sometimes from third parties like your employer and your financial adviser (if applicable). We will only share your PI where necessary to perform our activities with our administrator (Australian Administration Services Pty Ltd, being a part of MUFG Pension & Market Services Holdings Ltd), service providers, as required by law or court/tribunal order, or with your permission. Your PI may be accessed overseas by some of our service providers and, where applicable to your circumstances, by third-party service providers of your financial adviser. Our Privacy Policy details how to access and change your PI, as well as our privacy complaints process. For complete details go to [australiansuper.com/privacy](https://australiansuper.com/privacy) or call us on **1300 300 273**.

# Binding death benefit nomination

Use this form to set up, change or cancel a binding nomination.

Please complete in pen using CAPITAL letters and print (X) to mark boxes. Form must be completed in full. Read the Privacy Collection Statement on this form to see how AustralianSuper uses your personal information.

## 1 Provide your personal details

Last name

First name/s

Street address

Suburb/Town

Telephone (business hours)  Mobile number  Member number<sup>1</sup>

Mr  Mrs  Ms  Miss  Dr

Date of birth

State  Postcode

<sup>1</sup> You must complete a separate form for each account you hold.

## 2 Nominate who you want to receive your death benefit

Read *Who can I nominate?* on page 1 before filling in this section.

If you're nominating your 'Legal personal representative', you do not need to complete the sections headed 'Full name' and 'Residential address' for that part of your nomination. However, you must complete the '% of benefit' section.

If you have more than five nominees, please attach them to this form on a separate sheet of paper. **Please use the two decimal point spaces provided for the benefit percentages (% of benefit) section to add up to 100.00%. Only select one relationship per nomination.**

| Full name                           | Relationship  | Residential address | % of benefit   |
|-------------------------------------|---|---------------------|--|
|                                     | <input type="checkbox"/> Spouse<br><input type="checkbox"/> Child <sup>2</sup><br><input type="checkbox"/> Interdependant<br><input type="checkbox"/> Financial dependant <sup>3</sup><br><input type="checkbox"/> Legal personal representative (executor or administrator of your estate) |                     | <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> % |
|                                     | <input type="checkbox"/> Spouse<br><input type="checkbox"/> Child <sup>2</sup><br><input type="checkbox"/> Interdependant<br><input type="checkbox"/> Financial dependant <sup>3</sup><br><input type="checkbox"/> Legal personal representative (executor or administrator of your estate) |                     | <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> % |
|                                     | <input type="checkbox"/> Spouse<br><input type="checkbox"/> Child <sup>2</sup><br><input type="checkbox"/> Interdependant<br><input type="checkbox"/> Financial dependant <sup>3</sup><br><input type="checkbox"/> Legal personal representative (executor or administrator of your estate) |                     | <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> % |
|                                     | <input type="checkbox"/> Spouse<br><input type="checkbox"/> Child <sup>2</sup><br><input type="checkbox"/> Interdependant<br><input type="checkbox"/> Financial dependant <sup>3</sup><br><input type="checkbox"/> Legal personal representative (executor or administrator of your estate) |                     | <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> % |
|                                     | <input type="checkbox"/> Spouse<br><input type="checkbox"/> Child <sup>2</sup><br><input type="checkbox"/> Interdependant<br><input type="checkbox"/> Financial dependant <sup>3</sup><br><input type="checkbox"/> Legal personal representative (executor or administrator of your estate) |                     | <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> % |
| <b>TOTAL MUST ADD UP TO 100.00%</b> |   |                     | <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> % |

<sup>2</sup> If your nomination(s) include stepchildren, the nomination will end if/when the relationship between you and the natural parent ends. For example, upon death or divorce. They may be able to qualify as having an interdependent relationship at the time of your death.

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