

# Nomination of Beneficiary Form

## Section 1 – Your personal details

Title	Member number	Account number (if known)	Date of birth (DD/MM/YYYY)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	
Account type (tick one): <input type="checkbox"/> Super Account <input type="checkbox"/> Allocated Pension Account				
Surname				
<input type="text"/>				
Given name(s)				
<input type="text"/>				
Residential address				
<input type="text"/>				
Town/Suburb/City		State	Postcode	
<input type="text"/>		<input type="text"/>	<input type="text"/>	
Postal address <input type="checkbox"/> (Tick box if same as above)		State	Postcode	
<input type="text"/>		<input type="text"/>	<input type="text"/>	
Telephone (home)	Telephone (work)	Mobile number		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Email				
<input type="text"/>				

## Section 2 – Beneficiary details

Please read the 'Important information' overleaf before you complete this section. If you would like all or part of the benefit to be paid to your Estate (then distributed in accordance with your Will), please tick the 'Legal Personal Representative' box, otherwise please nominate the people you would like to receive your Death Benefit. Please remember to write in the % of benefit each should receive and that the total must be 100%.

**Recipient**  Legal Personal Representative

**OR**

### Beneficiary 1

Surname	Given name(s)
<input type="text"/>	<input type="text"/>
Date of birth (DD/MM/YYYY)	Relationship to you
<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/>
	% of benefit
	<input type="text"/>

### Beneficiary 2

Surname	Given name(s)
<input type="text"/>	<input type="text"/>
Date of birth (DD/MM/YYYY)	Relationship to you
<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/>
	% of benefit
	<input type="text"/>

### Beneficiary 3

Surname	Given name(s)
<input type="text"/>	<input type="text"/>
Date of birth (DD/MM/YYYY)	Relationship to you
<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/>
	% of benefit
	<input type="text"/>

### Beneficiary 4

Surname	Given name(s)
<input type="text"/>	<input type="text"/>
Date of birth (DD/MM/YYYY)	Relationship to you
<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/>
	% of benefit
	<input type="text"/>

You can nominate more than four beneficiaries by providing their details on a separate piece of paper attached to this form that is signed and dated by you and witnessed in the same manner as this form.

## Section 3 – Nomination details

This is a (tick one):

Binding Nomination **OR**  Non-Binding Nomination

## Section 4 – Member's declaration

I request and direct the Trustee to distribute any benefit payable in the event of my death in accordance with this form. This Nomination form supersedes any previous nomination of beneficiary. I acknowledge that I have read and understood the Binding Nomination rules over page, and that my nomination complies with these requirements.

By signing this form you acknowledge receipt of the First Super Product Disclosure Statement (PDS) and documents referred to in the PDS. You can obtain these and other information by calling First Super on **1300 360 988** or visit **firstsuper.com.au**

Please sign here

Date (DD/MM/YYYY)

## Section 5 – Witness declaration (Binding Nomination only)

I declare I am over the age of 18, not named as a beneficiary on this form and this Binding Nomination was signed by the member in my presence on the same date it was signed by me.

### Witness 1

Surname

Given name(s)

Residential address

Town/Suburb/City

State

Postcode

Signature

Date (DD/MM/YYYY)

### Witness 2

Surname

Given name(s)

Residential address

Town/Suburb/City

State

Postcode

Signature

Date (DD/MM/YYYY)



**Please return this completed form by:**

**Mail** First Super  
PO Box 666  
Carlton South VIC 3053

**Email** forms@firstsuper.com.au

**Want to know more? We're here to help.**

**Call** 1300 360 988  
**Email** mail@firstsuper.com.au  
**Website** firstsuper.com.au

## Important information about nomination of beneficiaries

### The difference between a Binding and Non-Binding Nomination

A Binding Nomination is an instruction to the Trustee about who is to receive your benefit in the event of your death. The Trustee is legally bound to follow this instruction, provided that the nomination is legally valid and the person(s) nominated qualify for payment under the law when the benefit is paid. A Binding Death Benefit Nomination is valid for three years and may be appropriate if your personal circumstances are stable.

A Non-Binding Nomination is a request for the Trustee to pay your benefit in a certain way in the event of your death. It is not legally binding, but is taken into account. The Trustee is obliged to follow the law in working out who should receive a Death Benefit. A Non-Binding Nomination may be appropriate if your personal circumstances are unsettled.

### Who can receive a Death Benefit?

A Death Benefit can be received by one or more dependants or your Legal Personal Representative (Estate).

A dependant is generally a child, spouse or a person with whom you have an interdependency relationship. Two people may have an interdependency relationship if:

- They have a close personal relationship
- They live together
- One or each of them provides the other with financial support
- One or each of them provides the other with domestic support and personal care.

An interdependency relationship may also exist where there is a close personal relationship between two people who do not satisfy other criteria because either or both of them suffer from a physical, intellectual or psychiatric disability.

Examples of interdependency relationships may include:

- Same sex couples who reside together and are interdependent
- Siblings who reside together
- An adult child who resides with and cares for an elderly parent.

### Special rules for Binding Nominations

- A Binding Nomination must be signed by two witnesses who are at least 18 years old and are not named as beneficiaries.
- This form is invalid if not received by the Trustee before your death.
- Only your dependants or legal personal representative can be nominated to receive a share of a Death Benefit. Whether or not a person is eligible to receive part of your Death Benefit is determined at the date of your death.
- Your Binding Nomination will cease to have effect if you subsequently marry, remarry or divorce. You can amend or revoke a Binding Nomination at any time by sending a new nomination form.
- If a person you have nominated dies before you or is not eligible to receive a share of your Death Benefit, that person's part will be distributed equally amongst the surviving nominated dependants and/or legal personal representative.
- If you do not provide all details requested in this form, or if it is not properly witnessed the form is a Non-Binding Nomination.
- If you fail to properly and clearly specify the % of your benefit payable to each person, it will be distributed equally amongst those persons nominated who are eligible to receive a benefit, providing the nomination form was otherwise valid.

## Want to know more? We're here to help.

**Call** 1300 360 988  
**Email** mail@firstsuper.com.au  
**Website** firstsuper.com.au



**Disclaimer:** This was issued by First Super Pty Ltd (ABN 42 053 498 472, AFSL 223988) as Trustee of the First Super superannuation fund (ABN 56 286 625 181). The contents were accurate at August 2017. You can obtain a PDS by calling **1300 360 988** and should consider it before making any decision. This document cannot be relied on as personal financial advice. You can obtain personal financial advice from us by contacting us on **1300 360 988**. Financial advice will be provided by Industry Fund Services Pty Ltd (ABN 54 007 016 195, AFSL 232514) and may be free of charge to you.