

Nomination of Beneficiary Form



Office Use Only: Member Number

Please complete this form with **BLOCK LETTERS** and a blue or black pen.

Section 1 – Your personal details

Title (Mr, Mrs, Ms etc)

Date of birth (DD/MM/YYYY)

Sex (M/F)

Surname

Given name(s)

Residential address

Suburb

State

Postcode

Postal address (Tick box if same as above)

State

Postcode

Telephone (home)

Telephone (work)

Mobile

Email address

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%. Each beneficiary must also be a dependant (see 'Who can receive a Death benefit' on page 3 of this form).

Recipient Legal Personal Representative

Beneficiary 1

Surname

Given name(s)

Date of birth (DD/MM/YYYY)

Relationship to you

% of benefit

Beneficiary 2

Surname

Given name(s)

Date of birth (DD/MM/YYYY)

Relationship to you

% of benefit

Beneficiary 3

Surname

Given name(s)

Date of birth (DD/MM/YYYY)

Relationship to you

% of benefit

Beneficiary 4

Surname

Given name(s)

Date of birth (DD/MM/YYYY)

Relationship to you

% of benefit

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 declaration (must be completed in all cases)

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.

I confirm that I am authorised to provide the personal details presented and I consent to my information being checked with the document issuer or official record holder via third party systems for the purpose of confirming my identity.

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

Full name

Date of birth (DD/MM/YYYY)

Address

Signature

Date (DD/MM/YYYY)

Witness 2

Full name

Date of birth (DD/MM/YYYY)

Address

Signature

Date (DD/MM/YYYY)



Please return this completed form by:

Mail First Super
PO Box 666
Carlton South, VIC 3053
Email mail@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.

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.

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, financial dependant, 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.

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. Your witnesses must sign and date the Binding Nomination at the same time as you.
- > 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
- > You can amend or revoke a Binding Nomination at any time by sending a new Nomination Form. It is important to update your nominations when your circumstances change.
- > 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 among 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 among those persons nominated who are eligible to receive a benefit, providing the Nomination Form was otherwise valid. Your Binding Nomination will no longer be binding on the Trustee after three years. You will need to make a new Binding Nomination every three years if you wish to bind the Trustee, otherwise your benefit will be paid at the Trustee's discretion.