

Reversionary Beneficiary Nomination Form



ALL SECTIONS MUST BE COMPLETED

PLEASE ☒ NOT ☒

PLEASE USE BLOCK LETTERS

ARE YOU A CURRENT MEMBER OF CLUB SUPER?

☐ YES ☐ NO

CLUB SUPER MEMBER NUMBER

Note: if you change your name please attach a Certified copy of your Marriage Certificate, Deed Poll or a Statutory Declaration as proof.

PERSONAL DETAILS

TITLE

☐

MR

☐

MRS

GENDER

☐

MALE

☐

FEMALE

☐

MS

☐

DR

DATE OF BIRTH

FIRST NAME

MIDDLE NAME

FAMILY NAME

RESIDENTIAL ADDRESS

STREET NUMBER

STREET NAME

SUBURB/TOWN

STATE

POSTCODE

POSTAL ADDRESS (if same as above, write "as above")

PO BOX

SUBURB/TOWN

STATE

POSTCODE

EMAIL AND PHONE DETAILS

EMAIL ADDRESS

SECOND EMAIL ADDRESS

YOUR TELEPHONE NUMBER

MOBILE NUMBER

IMPORTANT INFORMATION

By nominating a reversionary beneficiary, they will continue to receive your Club Income Stream payments after your death, or they can commute the Income Stream and be paid a lump sum benefit.

A reversionary beneficiary must be a person, who at the time of your death, was:

A dependent

- Your spouse (including de-facto or same sex partner);
- A person with whom you had an interdependency relationship (definition can be found in *Additional Information - Nominating a beneficiary* available at clubsuper.com.au/members/publications); or
- Your child, but only if the child is under 18, or between 18-25 and financially dependant upon you, or has a disability as defined by the Disability Services Act 1986.

The nomination must be signed by you.

- Your nomination will remain valid with the Fund, unless:
 - you revoke it with the Fund;
 - on death of the reversionary beneficiary;
 - when your interdependent relationship ceases;
 - if your reversionary beneficiary ceases to be a financial dependant; or
 - on divorce (if you have nominated your spouse).
- Your current nomination may be amended at any time by submitting a new approved form to the Trustee.
- Where your nomination has been cancelled or is otherwise invalid, the Trustee will consider that no valid nomination applies. In this event, the Trustee will pay your death benefits in accordance with the Club Super Trust Deed.
- It is your responsibility to keep your nomination up to date. If your personal circumstances change or if your nominated beneficiaries change (e.g. if your reversionary beneficiary dies or you become separated or divorced) you should complete a new form.
- **Please note:** This nomination is not binding on the Trustee of the Fund.

The information in this form is general information only and does not take into account individual objectives, financial situations or needs.

Refer to *Additional Information - Nominating a beneficiary* available at clubsuper.com.au/members/publications for more information.

PLEASE COMPLETE DETAILS ON THE NEXT PAGE AFTER READING THE IMPORTANT INFORMATION ABOVE

1 of 2

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UPDATE OF REVERSIONARY BENEFICIARY

Please select one box only

- ☐ I wish to add a reversionary beneficiary or change my existing reversionary beneficiary nomination (go to **Reversionary beneficiary nomination** section below); or
- ☐ I wish to cancel my existing reversionary beneficiary nomination (go to **Cancel existing reversionary beneficiary nomination** section in the next column).

REVERSIONARY BENEFICIARY NOMINATION

Please read the **Important Information** section on the previous page for details on who you can nominate. Only one of your eligible dependants can be nominated as your reversionary beneficiary. This nomination replaces any existing reversionary beneficiary, binding or preferred beneficiary nominations you may have previously made.

Nomination status:

- ☐ New Reversionary Beneficiary Nomination
- ☐ Change Existing Reversionary Beneficiary Nomination

In the event of my death, I direct the Trustee of Club Super to pay my death benefit from Club Super to:

Surname	<input type="text"/>
Given Name	<input type="text"/>
Date of Birth	<input type="text"/>
Relationship	<input type="text"/>

If your nomination does not meet the conditions as outlined in the **Important Information** section on the previous page, it will be invalid and your death benefit will be dealt with in accordance with the Trustee's decision based on the information received at the time of your death.

ONCE COMPLETE, PLEASE PROCEED TO DECLARATION SECTION IN THE NEXT COLUMN

CANCEL EXISTING REVERSIONARY BENEFICIARY NOMINATION

Please cancel the following reversionary beneficiary nomination:

Surname	<input type="text"/>
Given Name	<input type="text"/>
Date of Birth	<input type="text"/>
Relationship	<input type="text"/>

By canceling your reversionary beneficiary nomination, your death benefit will be dealt with in accordance with the Trustee's decision based on the information received at the time of your death.

ONCE COMPLETE, PLEASE PROCEED TO DECLARATION SECTION BELOW

DECLARATION

I declare that:

- I have read the *Club Super Income Stream PDS*;
- I have read and understand the Important information contained on page 1 of this *Reversionary Beneficiary Nomination Form*;
- I will notify the Trustee immediately if my circumstances change and make any necessary changes to my Reversionary Beneficiary Nomination

Your privacy is important to us

When your personal details are provided to Club Super, they are securely stored and are accessible only to authorised personnel and third parties for the purpose of administering your account. If you would like to see Club Super's Privacy Policy, visit **clubsuper.com.au** or call us on **1300 369 330** for a copy of the Privacy Policy.

SIGNATURE OF MEMBER

DATE SIGNED

RETURN COMPLETED FORM TO: CLUB SUPER PO BOX 10726 BRISBANE ADELAIDE STREET QLD 4000
OR EMAIL A SCANNED COPY OF THE COMPLETED FORM TO: info@clubsuper.com.au