

Binding Nomination Form

ALL SECTIONS MUST BE COMPLETED

PLEASE ☒ NOT ☒

PLEASE USE BLOCK LETTERS



This form should be completed when you wish to nominate a binding beneficiary. A Binding Nomination of beneficiary will receive your remaining account balance as a lump sum after your death. Where a Binding Nomination of beneficiary has been made, the Trustee of the Fund has no discretion in the event of your death and your benefits will be paid to the person nominated by you, provided the nomination is valid.

ARE YOU A MEMBER OF CLUB SUPER?

☐ YES ☐ NO If YES, Member No:

Note: if you have changed your name since first becoming a member please attach a certified copy of your Marriage Certificate, Deed Poll or a Statutory Declaration as proof.

Personal Details

Title ☐ Mr ☐ Mrs ☐ Miss ☐ Other Specify if Other

First Name

Middle Name

Family Name

Date of birth / /

Home Address

Street Number Street Name

Suburb/Town

State Postcode

Postal Address (If Same As Above, Write "As Above")

PO Box Suburb / Town

State Postcode

Contact Details

When you provide Club Super with your e-mail/mobile phone number, you will automatically be provided with digital access to key Fund communications.

Email Address

Secondary Email Address

Your Telephone Number

Mobile Number

Personal Details (continued)

Communication Preference

I would like to receive future communications and notifications from the Fund by:

- ☐ Email
☐ SMS
☐ Mail/print

You can change your communication preference at any time by calling us on **1300 369 330**.

This binding death nomination of beneficiaries applies to my:

- ☐ Club Super Superannuation account(s)
☐ Club Super Income stream account(s)

Club Super accumulation account member number(s):

No.1:

No.2:

No.3:

Club Income Stream account member number(s):

No.1:

No.2:

No.3:

If you're unsure of your member number(s), refer to your most recent Club Super correspondence or call us on **1300 369 330**

Important Information

A binding nomination will apply only to the specific account you list on this form, unless you indicate on the form that the nomination is to be applied to all of your superannuation and/or Income Stream accounts within the Fund. In this case, you will need to nominate all relevant account numbers on the form. Please note that a binding nomination will not override any existing reversionary nomination you may have in place in relation to an Income Stream account.

Once you have made your nomination and the fully completed form has been received by the Trustee, the nomination is legally binding so long as it remains valid. If your binding nomination is still valid at the time of your death, the Trustee of the Fund will pay your death benefit to your nominated beneficiary/ies.

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Important Information *(continued)*

If you do not nominate a beneficiary, or if your nomination has been cancelled, or is invalid, the Trustee will consider that no valid nomination applies and will pay your benefits in accordance with the Club Super Trust Deed. A beneficiary must be your legal personal representative (the executor or administrator of your estate) or a Dependant.

A Dependant includes:

- A Spouse (including de facto spouse or same sex partner)
- Child of any age
- Any person with whom you have an interdependency relationship (this includes someone who depends on you financially)

YOUR NOMINATION WILL BECOME INVALID IF AT ANY TIME:

- The form is not correctly signed and witnessed;
- Your nomination was made more than 3 years ago;
- Anyone nominated on this form dies before you;
- Anyone nominated on this form does not qualify as a dependant at the time of completing the form;
- Anyone nominated on this form no longer qualifies as a dependant at the time of your death.

If your nominated beneficiary is under 18 years, the Trustee of Club Super may pay this benefit to the guardian to use for the maintenance, support or advancement of your nominated beneficiary. Alternatively, the Trustee may forward this benefit to the Public Trustee to hold in trust until the nominated beneficiary turns 18. **It is important that you review your**

nomination regularly and consider updating your nomination whenever your personal circumstances change. You may nominate, amend or cancel your nomination at any time, but you must use this form to do so.

This form must be signed by you and two witnesses, both of whom must be at least 18 years old and not nominated as beneficiaries. **Any alterations to this form must be initialled by you and both witnesses. The original form must be returned to Club Super as it will not be accepted if faxed or emailed.**

Before entering into a binding nomination you should seek professional advice to understand the tax consequences and consider the suitability of the nomination for your specific needs.

For more information on nominating beneficiaries refer to *Additional Information - Nominating a beneficiary* available at clubsuper.com.au/forms-and-resources/publications.

This information is of a general nature only, it does not take into account your individual financial situation, objectives or needs. You should consider your own financial position and requirements before making a decision. You should also refer to the Club Super Product Disclosure Statement (PDS) or Club Income Stream PDS before making a decision.

Tax issues around estate planning and superannuation can be complex. You may want to seek appropriate legal advice before making this nomination.

Need financial advice? Contact us on 1300 369 330 to discuss the options available to you.

Binding Nomination Of Beneficiaries

A Binding Nomination of Beneficiaries allows you to nominate one or more beneficiaries to receive your benefits in the event of your death. All nominations must have two witnesses who are at least age 18 and who are not nominated as beneficiaries. Your nomination will be binding on Club Super in the event of your death if it meets the conditions outlined on this form and is accepted and approved by the Trustee.

Nomination Status: ☐ New Nomination ☐ Cancel Nomination

In the event of my death, I direct the Trustee of Club Super to pay my death benefit from Club Super in accordance with the following directions. Please ensure you only tick one box per row below, and if you intend nominating your legal personal representative, please complete the separate row under the table:

Given Name	Surname	Date of Birth	Relationship	% Allocation
			<input type="checkbox"/> Spouse <input type="checkbox"/> Interdependent <input type="checkbox"/> Child	
			<input type="checkbox"/> Spouse <input type="checkbox"/> Interdependent <input type="checkbox"/> Child	
			<input type="checkbox"/> Spouse <input type="checkbox"/> Interdependent <input type="checkbox"/> Child	
			<input type="checkbox"/> Spouse <input type="checkbox"/> Interdependent <input type="checkbox"/> Child	

Legal Personal Representative	% Allocation
<input type="checkbox"/>	

The above table must be completed in full and the total must add to 100% or this nomination will not be valid. When making a decision on the beneficiary(s) you wish to nominate please read the important information on page 1 of this form. If your nomination does not meet these conditions 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.

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Member Declaration

NOTE: Member must sign and date this form in the presence of two witnesses. **The dates on this form must be the same for this nomination to be valid.**

I declare that:

- I have read the Product Disclosure Statement
- I have read and understand the Important information contained on page 1 of this Binding Death Nomination of Beneficiaries form
- I will notify the Trustee immediately if my circumstances change and make any necessary changes to my Binding Death 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.

Name Of Member

You must sign this form in the presence of 2 witnesses who are over 18 and who are not named as beneficiaries.

Signature Of Member

SIGN HERE

Date

 / /

Witness Declaration

Witness A - I declare that I am aged 18 or over, I am not a beneficiary nominated on this form and the member signed and dated this binding nomination in my presence.

First Name Of Witness A

Family Name Of Witness A

Signature Of Witness A

SIGN HERE

Date Witnessed

 / /

First Name Of Witness B

Family Name Of Witness B

Signature Of Witness B

SIGN HERE

Date Witnessed

 / /

Have you completed all sections of this form?

Return completed form and relevant documents to:

Club Super PO Box 10726 Brisbane Adelaide Street QLD 4000