

## Contents and instructions

Please complete this form to confirm a previous nomination of beneficiary, revoke an existing nomination, or request a new nomination. You should seek financial advice prior to completing this form.

If you have more than one membership within a fund, you will need to complete separate nomination forms for each membership.

It is important that you carefully read and understand each of the steps when completing this form to ensure you have correctly made your binding nomination(s) for your funds.

If you need assistance with completing this form, please contact our Customer Service Centre on:

- 133 056 for members of Super Directions for Business, Super Directions for Business Rollover Section, Tailored Super, Tailored Super Rollover Plan, Simple Super and Simple Super Rollover Plan, or
- 131 737 for members of the Super Directions Personal Super Plan (PSD).

### Step 1 Information on nominations

Please carefully read this section to ensure you understand how binding death nominations work.

### Step 2 Benefit nomination

Please select your benefit nomination.

### Step 3 Plan/Member details

Complete the full name in which the membership is held, including plan and member number.

### Step 4 Confirmation of existing binding death nomination

Please tick and sign this section if you wish to re-confirm a previous nomination.

Please note: Your nomination expires after three years. We strongly recommend that you review your nomination regularly and update it as your personal circumstances change. It is your responsibility to keep your nomination up to date and review it every three years.

### Step 5 Nomination (or change of nomination) of beneficiary(ies)

Complete this section to nominate your Legal personal representative or person(s) as beneficiary(ies) of your superannuation benefit(s) in the event of your death.

Please complete the full personal details of your nominated beneficiaries as per the example below. The total benefits must equal 100 per cent.

Please note: For members of Super Directions for Business, Simple Super and Tailored Super, on transfer from an employer plan to the Super Directions for Business Rollover Section upon ceasing employment or for members of Tailored Super Rollover Plan or Simple Super Rollover Plan who upgrade their membership to the Super Direction for Business Rollover Section, your death benefit nomination will continue to apply to your new membership until the expiry date three years from the date you signed the nomination form.

#### Example of Nomination of beneficiaries

My legal personal representative (eg the executor of your Will)

OR

Ms	Sally	Field	10/03/1941	100 %	<input type="checkbox"/> Male	<input checked="" type="checkbox"/> Female
Title	Given name(s)	Surname	Date of birth	% of benefit		

Address

Relationship to member:  Spouse  Child  Interdependent  Financial dependant

### Step 6 Declaration

This section MUST be signed and dated by you (the member) in the presence of two witnesses.

### Step 7 Binding nomination(s) witness signatures

This section MUST be completed and signed by two independent witnesses.

The witnesses must be aged 18 years or over and not be nominated as beneficiaries.

### Step 8 Return form to AXA

Once completed please send this form to:

AXA Customer Service Centre  
PO Box 14669  
MELBOURNE VIC 8001

**Please note: We are unable to accept this form via fax or E-mail.**

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## Death benefit beneficiary nomination form

### Step 1 Information on nominations

#### Non-binding death benefit nominations

If you elect to make a non-binding death benefit nomination, the Trustee will consider the nomination provided by you but has discretion to pay your benefit to one or more of your dependants and/or legal personal representative in proportions it determines.

#### Binding death benefit nominations

A binding death benefit nomination gives you certainty about who will receive your superannuation benefit in the event of your death.

When you have nominated a beneficiary and the nomination is valid under superannuation law, the Trustee will act in accordance with that nomination. However, the Federal Government has imposed strict conditions on how a beneficiary must be nominated. For the nomination to be valid:

- A beneficiary must be a spouse (including de facto spouse and same sex partner), a child (including an adopted child, step child, or ex-nuptial child).
- The child of the member's spouse, or any person who is, or was at the relevant time, in the opinion of the Trustee in an interdependency relationship with the member (generally a close personal relationship between two people who live together, where one or both provides the other with financial support, domestic support and personal care), a legal personal representative, or any person who in the opinion of the Trustee is, or was at the relevant time, financially dependent in whole or in part upon the member.
- If any beneficiary nominated is not a dependant in the opinion of the Trustee and according to superannuation law at the date of your death, this notice will be invalid.
- You must clearly set out the proportion of benefit to be paid to each beneficiary and the sum of the beneficiaries proportions must add up to 100%.
- This nomination may be amended or revoked at any time by submitting the approved form. It will be valid for a maximum period of three years if no amendment is made. Your signature must be witnessed by two witnesses aged 18 years or over, neither of whom is nominated as a beneficiary. The administrator will attempt to contact you before the nomination expires to ask you to renew your nomination. However, it is your responsibility to review and update it every three years. AXA accepts no liability for any failure on your part to do so.
- Any amendments must be submitted on the approved form. Copies are available from your financial adviser or by calling our Customer Service Centre on 133 056 or 131 737.
- Step 6 must be signed and dated by you in the presence of your two witnesses who must also sign and date step 7.

If you would like to nominate more than four dependants please complete an additional form. If you do not wish to nominate a dependant or your nomination is invalid or defective, any benefit payable on your death will be paid at the Trustee's discretion to your dependants or legal personal representative. If the Trustee is unable to locate any of your dependants or your legal personal representative, it may pay your benefit to any other person permitted by superannuation law (usually a next of kin of the deceased member). You should update your nomination if there is any change to your personal circumstances. If you nominate your legal personal representative, please ensure you have a valid and up-to-date Will. If you die without a Will, the Trustee is required to pay the benefit to a court-appointed administrator who will pay the benefit in accordance with a statutory formula, which varies from state to state. Payment to a legal personal representative may take longer as it is necessary for a Grant of Probate or Letters of Administration to be issued before the benefit can be paid. You should note that by directing payment to your legal personal representative you are exposing the benefit to claims by creditors of your estate.

### Step 2 Benefit nomination

Tick one of the options below and follow the instructions.

I wish to confirm my existing binding death benefit nomination – Complete steps 3, 4 and 6

OR

I wish to revoke my existing binding death benefit nomination – Complete steps 3, 6 and 7

I understand this means that in the event of my death the Trustee will have the discretion to determine to whom the benefit is paid.

Please note: Section 7 of this form must also be completed signed and dated by two witnesses who have seen you sign and date the form.

OR

I wish to make a new non-binding benefit nomination – Complete steps 3, 5 and 6

I understand that the Trustee will decide who will receive my benefit in the event of my death.

The Trustee will generally pay your nominated dependant(s) but may decide to pay your death benefit differently.

OR

I wish to make a new binding death benefit nomination – Complete steps 3, 5, 6 and 7

### Step 3 Plan/Member details

Plan name (not required for PSD)

Plan reference (not required for PSD)

Member number

Mr  Mrs  Miss  Ms  Other please specify

Surname (please print)

Given name(s)

Street number and name

Town/Suburb

State

Postcode

Home telephone

Work telephone

Mobile number

Email address

**Death benefit beneficiary nomination form**

**Step 4 Confirmation of existing binding death benefit nomination**

I wish to confirm my existing binding death benefit nomination.

**Step 5 Nomination (or change of nomination) of beneficiaries**

My legal personal representative (eg the executor of your Will)

**OR**

**1**     / /  %  Male  Female  
Title Given name(s) Surname Date of birth % of benefit

Address

Relationship to member:  Spouse  Child  Interdependent  Financial dependant

**2**     / /  %  Male  Female  
Title Given name(s) Surname Date of birth % of benefit

Address

Relationship to member:  Spouse  Child  Interdependent  Financial dependant

**3**     / /  %  Male  Female  
Title Given name(s) Surname Date of birth % of benefit

Address

Relationship to member:  Spouse  Child  Interdependent  Financial dependant

**4**     / /  %  Male  Female  
Title Given name(s) Surname Date of birth % of benefit

Address

Relationship to member:  Spouse  Child  Interdependent  Financial dependant

**Step 6 Declaration**

I have read the information in step 1 and understand these conditions. I direct the Trustee to accept my death benefit nomination for my plan.

/ /   
Member's signature Date

**Step 7 Binding nomination(s) witness signatures**

Witness A - I declare that the above notice was signed and dated by the member in my presence and that I am aged 18 years or over.

/ /   
Signature Name Date

Witness B - I declare that the above notice was signed and dated by the member in my presence and that I am aged 18 years or over.

/ /   
Signature Name Date