



For the member to complete and sign

This form enables you to nominate the person(s) to receive your superannuation benefit in the event of your death. Before completing this form, please read the information enclosed.

Member details

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
 Date of birth
 Policy number

To confirm or revoke an existing binding nomination

Please tick the appropriate box, sign, date and return the form to AXA.

- I confirm my current nomination as detailed in the letter accompanying this form and understand this extends the term of this nomination for a period of three years from the date this form is signed. (You **are not** required to have this form witnessed.) If you are confirming your current nomination, please proceed to the Declaration section for completion.
- I revoke my current binding nomination. (You **are** required to have this form witnessed.) If you have chosen to revoke your current binding nomination and do not nominate binding nominees, the Trustee will have discretion as to who will receive your benefit in the event of your death.

To make a new binding nomination, please complete this section

Upon my death, I direct the Trustee of the Super Directions Fund to pay my death benefit as follows:

Nominee details

1

Full name

/ /
 Gender Male Female
 Date of birth

%
 Percentage of death benefit

The nominee's relationship to you
 Spouse
 Interdependency relationship
 Child
 Financial dependant
 LPR*

 Street number and name
 Town/Suburb
 State
 Postcode

2

Full name

/ /
 Gender Male Female
 Date of birth

%
 Percentage of death benefit

The nominee's relationship to you
 Spouse
 Interdependency relationship
 Child
 Financial dependant
 LPR*

 Street number and name
 Town/Suburb
 State
 Postcode

Super Directions **Binding death benefit nomination form**

3 / / Gender Male Female
Full name Date of birth

% The nominee's relationship to you Spouse Interdependency relationship
Percentage of death benefit Child Financial dependant
 LPR*

Street number and name Town/Suburb State Postcode

4 / / Gender Male Female
Full name Date of birth

% The nominee's relationship to you Spouse Interdependency relationship
Percentage of death benefit Child Financial dependant
 LPR*

Street number and name Town/Suburb State Postcode

* LPR is your legal personal representative eg the executor of your will.

Note: the death benefit must total 100 per cent and each percentage must be a whole number eg 34 per cent not 34.5 per cent.

Declaration

This declaration **must** be signed in the presence of both witnesses

I have read the 'Information on completing this form' section and understand that:

- in the event of my death, the Trustee will pay my death benefit in accordance with this nomination
- unless I revoke or amend before expiring, this nomination will cease to be valid in three years time, and
- this nomination revokes any previous nomination that I may have made.

/ /
Signature Date

Witness declaration

I declare that:

- I am 18 years of age or over and am not a person nominated above, and that this nomination was signed by the member in my presence.

/ /
Witness one full name Signature Date

/ /
Witness two full name Signature Date

Please return all completed and signed forms to:

AXA
Customer Service
PO Box 14330
MELBOURNE VIC 8001

Information on completing this form

- 1 If you do not wish to make a death benefit nomination that is binding on the Trustee and would prefer the Trustee to have discretion in relation to the payment of your superannuation benefit after your death, please contact our Customer Service Centre on 132 987.
- 2 Unless you revoke your nomination before its expiry, your binding nomination will remain valid for a period of three years from the date you last made, confirmed (renewed) or amended it. It will also become invalid if one of your binding nominees ceases to be a dependant. For example if you become divorced after nominating your spouse.
- 3 If you have made a binding nomination, and that nomination is valid, the Trustee must comply with the nomination. A binding nomination must be updated every three years and must be witnessed. If you make a nomination that is not binding, or do not make a nomination, the Trustee will pay the benefit to one or more of your dependants or legal personal representative in accordance with the governing rules of the Fund. If the Trustee is unable to identify a legal personal representative or dependant, the Trustee will pay the benefits in favour of another individual as permitted by the applicable law.
- 4 To be valid, a nomination must:
 - (a) be fully completed, signed and dated by you
 - (b) be witnessed by two people who are 18 years of age or over and neither of them can be a binding nominee named on the form. Each witness must also sign and date the Witness Declaration section. Please note, the date of your signature and the witnesses' signatures must be the same
 - (c) nominate one or more dependants or a legal personal representative and provide the percentage of the death benefit for each nominee to receive in the event of your death. The proportional entitlements must total 100 per cent and each percentage must be a whole number eg 34 per cent not 34.5 per cent.
- 5 If a binding nomination is invalid, it will not be binding on the Trustee and the Trustee will have discretion to determine to whom your death benefit is paid.
- 6 No matter what type of nomination, the Trustee must ensure that the benefits are paid to your legal personal representative or dependants as defined in the Trust Deed and applicable law. A summary of the Trust Deed definition of a dependant is:
 - (a) the spouse, de facto spouse, widow, widower, child or children (including any adopted child or step-child, ex-nuptial child or unborn child) of a member, or
 - (b) any person who, in the opinion of the Trustee is, at the date of your death, either wholly or partially dependent on a member or who has or had at the relevant date a legally enforceable right to look to that member for financial support, or
 - (c) any person who was at the date of your death, in the opinion of the Trustee, in an interdependency relationship with you (generally a close personal relationship between two persons who live together, where one or each provides the other with financial support, domestic support and personal care).
- 7 A legal personal representative is the person authorised to deal with your estate, such as the executor named in your will or the administrator of your estate where you have not made a will.
- 8 This form provides for up to four nominations. If you wish to nominate more than four, please complete a second nomination form at the same time as completing this form. Please clearly state that the second form is a continuation of the first. You may obtain a second form from your financial adviser or from our Customer Service Centre by calling 132 987.
- 9 The proportional entitlement for all nominees must total 100 per cent and each percentage must be a whole number eg 34 per cent not 34.5 per cent.
- 10 The nomination will only be effective if the completed form is received by the Trustee of the Super Directions Fund prior to the death of the member.

How do I confirm my current nomination?

- Simply provide written notice to the Trustee that you want to confirm your current nomination. You may use the enclosed form to confirm your nomination by providing the details required along with your signature and the date. Please note, when confirming a nomination, you do not need to have your notice witnessed.

How do I amend or revoke my current nomination?

- To amend your current nomination, please complete this form. To amend a nomination, the form must be signed and dated by you and must be witnessed.
- To revoke your current nomination, please tick the box provided. To revoke a nomination the form must be signed and dated by you and must be witnessed. If you have chosen to revoke your current binding nomination and do not nominate binding nominees, the Trustee will have discretion as to who will receive your benefit in the event of your death.