



This form allows you to make, amend or cancel a binding death benefit nomination for your Club Plus Super benefit. A binding death benefit nomination is a useful tool in your estate planning process.

It can bring you peace of mind in knowing your wishes will be respected when you are gone and helps your death claim to be paid faster.

For more details, please read the important information section over the page. Call us if you have any questions or concerns. You can also view your beneficiaries information via your online member account.

What is a binding death benefit nomination?

A binding death benefit nomination is a written direction to the Trustee of Club Plus Super that allows you to state who you want to receive your benefit payment upon your death.

With a valid binding death benefit nomination in effect at the date of your death, the Trustee must pay your benefit to the beneficiaries you have named in the percentages you have allocated.

How long will my nomination stay in place?

Your nomination remains in effect for three years from the date signed. We'll notify you prior to the expiry of your existing nomination so you can complete a new nomination form to ensure it remains valid.

Just like a Will, it is important to keep your nomination up-to-date. You should review your nomination if your circumstances change, for example if you get married or commence a de facto relationship, separate from your partner or have a child.

Here to help

We're here to help ensure your wishes are carried out. Once we've received your nomination, we will notify you to confirm your instructions are in place. We will also include details about your current nomination each year in your Annual Statement and on your online member account.

Contact us



member hotline: 1800 680 627 pension hotline: 1800 204 194



clubplussuper.com.au



member@clubplussuper.com.au

Binding Death Benefit Nomination (cont.)

Important information



Who can I nominate?

You may nominate one or more of your dependants and/or legal personal representatives. You may nominate as many beneficiaries as you like, ensuring that the percentage allocations add up to 100%.

'Dependants' are considered to be:

- your spouse (including de facto or same sex partner);
- your children (including adopted or foster children);
- any person you are in an interdependency relationship with (see below); or
- any other persons (irrespective of age) who are in any way financially dependent on you.

You do not need to provide evidence that a person you nominate is a dependant, however any person nominated will need to provide evidence to the Trustee that they were a dependant at the time of your death.

If your nomination is valid, the Trustee must pay your benefit according to your instructions no matter how much your circumstances have changed.

More information about an 'interdependency relationship'

An 'interdependent' relationship can be established if:

- two people have a close personal relationship where there is demonstrated and ongoing commitment to the emotional support and wellbeing of the two parties; and
- they live together (or are temporarily living apart); and
- financial support is provided by one or the other; and
- one or both parties provide domestic support and personal care of a level normally provided in a close personal relationship, rather than by a mere friend or flatmate.

OR

- if they do not live together, nor provide each other with financial, domestic or personal support or care, it is due to the fact that one or both of them suffer from a disability.

It is not considered an interdependent relationship if one of the parties involved is paid for the support they are providing on behalf of another person, organisation or government body.

Can I revoke or amend my nomination?

You may revoke or amend your nomination any time by providing written notice to the Trustee, signed and dated by you in the presence of two witnesses (both must be over 18 years of age) neither of whom is a nominated beneficiary.

Is there a cost involved?

There is no charge to establish, amend or cancel a binding death benefit nomination.

What if I have a reversionary pension?

If you have nominated a reversionary beneficiary for your Club Plus Pension, and they are alive and remain a dependant at the time of your death, this will take precedence over any binding beneficiary you have nominated.

A binding death benefit nomination only applies where a reversionary has not been nominated or if the nominated reversionary is no longer alive or no longer a dependant of the pensioner at the time of the pensioner's death.

Binding death benefit nomination



Please complete this form in black ink using BLOCK letters. This form must be completed, signed and witnessed, and returned to: **Club Plus Super Administration, Locked Bag 5007 Parramatta NSW 2124** or scan the form and email it to us at: **member@clubplussuper.com.au**. Your nomination is not valid until it has been received and accepted by the Trustee.



Section 1: Member details

Please select all accounts this change is to apply to: My superannuation account My pension account(s)

Member number:

If this instruction applies to more than one account, please include your other Club Plus Super member number here:

Title: Surname: Given name(s):

Address:

Suburb State Postcode

Phone number: Mobile number:

Email: Date of birth (DD/MM/YYYY):



Section 2: Beneficiary nomination

I wish to make a new binding death benefit nomination or amend my existing binding death benefit nomination.

A nominated beneficiary can only be your spouse (legal or de facto), child (including adopted or step-children), financial dependant, person with an interdependency relationship or the legal personal representative of your estate.

What percentage do you wish to allocate to each beneficiary?

Name:	Date of birth (DD/MM/YYYY):	Relationship:	Portion of benefit:
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Spouse <input type="checkbox"/> Financial Dependant <input type="checkbox"/> Child <input type="checkbox"/> Interdependent	<input type="text"/> %

Name:	Date of birth (DD/MM/YYYY):	Relationship:	Portion of benefit:
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Spouse <input type="checkbox"/> Financial Dependant <input type="checkbox"/> Child <input type="checkbox"/> Interdependent	<input type="text"/> %

Name:	Date of birth (DD/MM/YYYY):	Relationship:	Portion of benefit:
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Spouse <input type="checkbox"/> Financial Dependant <input type="checkbox"/> Child <input type="checkbox"/> Interdependent	<input type="text"/> %

Name:	Date of birth (DD/MM/YYYY):	Relationship:	Portion of benefit:
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Spouse <input type="checkbox"/> Financial Dependant <input type="checkbox"/> Child <input type="checkbox"/> Interdependent	<input type="text"/> %

AND/OR I wish to nominate the executor or administrator of my estate (my legal personal representative). %

You can nominate more beneficiaries by providing their details as above on a separate piece of paper and attaching it to this form. This must be signed, dated and witnessed on the same date as this form.

The total of all beneficiaries must add up to 100%

TOTAL 100%

I wish to cancel my existing binding death benefit nomination and have no nomination on my account.

Binding Death Benefit Nomination (cont.)



Section 3: Privacy

The personal information provided on this form about you and your nominated beneficiaries is collected by and held for Club Plus Super by the fund administrator Australian Administration Services (AAS) in accordance with the Australian Privacy Principles of the *Privacy Act 1988 (Cth)*, for the purpose of administering accounts and providing services associated with your membership of the Fund.

You should read the *Privacy Policy* at clubplussuper.com.au/privacy-policy before completing the form. Call us on **1800 680 627** for a hard copy of the Policy. The Policy contains information about how personal information is collected, used and disclosed, how you can correct your personal information, make a complaint about a privacy breach and other important information about safeguards in place to protect your personal information.

By providing your information, you acknowledge that you have read and understood the *Privacy Policy*.



Section 4: Declaration

In making this binding death benefit nomination I declare and understand that:

- I have read the 'important information' section attached to this binding death benefit nomination form.
- I am only able to nominate one or more of my dependants and/or legal personal representative.
- Each dependant I nominate must be my dependant at the date of my death and they will be required to provide evidence to the Trustee that confirms this.
- A binding death benefit nomination will not be in effect on an account that has a reversionary beneficiary in place.
- This binding death nomination applies to only the accounts which have been identified in Section 1.
- 100% of my Club Plus Super benefit must be allocated with instructions on the proportions to allocate clearly set out.
- I must sign and date my binding death benefit nomination in the presence of two witnesses, each of whom is over the age of 18 and neither of whom is nominated to receive my benefit.
- My binding death benefit nomination will not be valid until it has been received and accepted by the Trustee.
- My binding death benefit nomination will expire three years after the date it is signed.
- It is my responsibility to ensure that my binding death benefit nomination is valid and remains in effect.
- I can cancel or amend my binding death benefit nomination at any time.
- The personal information provided by me in this form will be used to distribute my death benefit.

Member's signature

Date (DD/MM/YY)

(This date must be the same as the witnesses)



Section 5: Witness declaration

This form must be signed in the two presence of two witnesses, each of whom is over the age of 18 and neither of whom is nominated on the form as a beneficiary. Both witness signed dates must be the same as the member's signed date.

I declare that I am over age 18, I am not a beneficiary nominated on this form and that the member has signed Section 4 in my presence.

Signature of witness 1:

Witness 1 name:

Date (DD/MM/YY):

Signature of witness 2:

Witness 2 name:

Date (DD/MM/YY):