

# Pension change details

- Personal details (complete Sections 1, 2, 3 & 7)
- Investment options (complete Sections 1, 2, 4, & 7)
- Payment options (complete Sections 1, 2, 5, & 7)
- Nomination of beneficiaries (complete Sections 1, 2, 6 & 7 plus 8 if applicable)

Please use **BLOCK letters and black ink** when completing this form.  
This request will be invalid if unsigned by the member (see Section 7).

Return this completed form to:  
legalsuper pension  
Locked Bag 5042  
Parramatta NSW 2124  
Phone: 1800 623 502  
Fax: 1300 663 844  
Email: mail@legalsuper.com.au

## 1. Member number

## 2. Previous contact details

 Mr  Mrs  Ms  Miss  Dr  Justice

Surname

Given Names

  


Date of birth (dd/mm/yyyy)

Postal Address

  


Town or Suburb

State

Postcode

Telephone Number

Mobile Number

Email

  


## 3. New contact details

If you wish to change the **date of birth** or **name** that is recorded in your personal details with legalsuper, you must provide original certified documentary evidence such as a birth, marriage or deed poll certificate. Only fill in those details which have changed. Leave other parts blank.

 Mr  Mrs  Ms  Miss  Dr  Justice

Surname

Given Names

  


Date of birth (dd/mm/yyyy)

Postal Address

  


Town or Suburb

State

Postcode

Telephone Number

Mobile Number

Email

#### 4. Investment options

You can invest in one investment option or any mix of investment options. The percentage for each option must be a whole number and the total must add to 100% or this nomination will be invalid. Please refer to 'Your investment choices' in the Pension PDS. The Pension PDS is available from the legalsuper website at [legalsuper.com.au](http://legalsuper.com.au) or by calling **1800 623 502**.

Please invest my pension amount as follows:

Investment Choice Option	% for each Investment Choice
Cash	<input type="text"/> %
Enhanced Cash	<input type="text"/> %
Conservative	<input type="text"/> %
Balanced	<input type="text"/> %
Low Fee Index	<input type="text"/> %
Growth - Fund default option*	<input type="text"/> %
Assertive	<input type="text"/> %
Aggressive	<input type="text"/> %
Australian Shares	<input type="text"/> %
Overseas Shares	<input type="text"/> %
Socially Responsible Investment (SRI)	<input type="text"/> %
Total (must be 100%)	<b>100 %</b>

\* The Growth option is legalsuper's default option. If you do not make an investment choice above, your account will be invested in the default option until you advise us otherwise.

I understand (and my signature following is evidence of this understanding) that:

- The investment performance of legalsuper's investment choice options is not guaranteed.
- If I do not select an investment choice option upon joining legalsuper, my super will be invested in the Growth option, which is the Fund's default option.
- My investment choice can be changed on any working day, and becomes effective on the following working day after legalsuper receives this correctly completed form.
- legalsuper will confirm my investment choice in writing.

I acknowledge that I should seek independent professional financial advice if I need assistance in making a choice.

#### When an investment switch will occur

In the event that you elect to switch investment choices, your investment switch will occur using the next available unit price.

All investment switches are managed using a weekly batch period, which is from Monday 12.01am to Sunday 11.59pm for online transactions, and Monday 12.01am to Friday 1.00pm for instructions received by post or fax. Instructions received by post or fax after 1.00pm on Friday will be treated as having been received on the next Monday, and will be processed in the following week's batch period.

Member investment choice switches received in this period will be applied to member accounts on the following Thursday (or if that is not a trading day, the next trading day) using the next unit price. Unit prices are updated each Wednesday (or if that is not a trading day, the next trading day).

#### 5. Payment options

If you do not choose below how frequently you would like your pension paid, legalsuper will automatically pay you each year in June.

I want to receive my income payments:

- Twice-monthly\*
- Monthly\*
- Quarterly (September/December/March/June)
- Half-yearly - in the months of  and
- Yearly - in the month of

Nominated date of first payment (dd/mm/yyyy)\*

\* **Note:** payments are processed on the 28th of each month (in arrears). Twice-monthly payments are processed on the 14th and 28th of each month (in arrears).

I want legalsuper to pay my pension amount in the following proportions from the listed choices:

Investment Choice Option	% for each Investment Choice
Cash	<input type="text"/>
Enhanced Cash	<input type="text"/> %
Conservative	<input type="text"/> %
Balanced	<input type="text"/> %
Low Fee Index	<input type="text"/> %
Growth - Fund default option*	<input type="text"/> %
Assertive	<input type="text"/> %
Aggressive	<input type="text"/> %
Australian Shares	<input type="text"/> %
Overseas Shares	<input type="text"/> %
Socially Responsible Investment (SRI)	<input type="text"/> %
Total (must be 100%)	<b>100 %</b>

I understand that if I do not select any investment options here, my pension will be paid to me in the same proportions as my nominated investment choices in Section 4

#### Regular income payment

(Please tick one box only)

- The **minimum amount** per annum required under legislative guidelines
- The **maximum amount** per annum allowed under legislative guidelines\*
- A **nominated amount** (subject to min/max guidelines):

\$

\* There is no maximum amount unless you are receiving a Transition to Retirement pension.

## Payment instructions

Credit the following bank/building society/credit union (via electronic funds transfer where applicable)

Bank name/financial institution

Address of bank (suburb)

Account holder's name



BSB number

Account number

## 6. Nomination of beneficiaries

You may elect to make either a Binding or Non-binding nomination of beneficiaries to whom your accrued legalsuper entitlements will be paid in the event of your death.

A Non-binding nomination of preferred dependants is not binding on the Trustee, but will assist the Trustee in exercising its discretion. The Trustee will determine what proportion of your entitlements goes to one or more of your dependants or your legal representative on your death. Unless the Trustee decides to pay the benefits to your estate, your entitlements will not form part of your estate and will therefore not be subject to the terms of your will.

A Binding nomination of dependant(s) or legal personal representative(s) will bind the Trustee to pay your entitlements on your death exactly as you specify. Your nomination will only be binding if it is made in accordance with the relevant requirements.

One of these requirements is that you sign the declaration in Section 8 overleaf and have two persons over 18 years of age witness the declaration in your presence.

### 'Dependant' is defined as:

- (a) the spouse of the person, any child of the person and any person with whom the person has an interdependency relationship at the relevant time (being in the case of a deceased person the date of their death); and
- (b) any other person who in the opinion of the Trustee is at the relevant time (being in the case of a deceased person the date of their death) wholly or partially dependent on the person.

### Interdependency

Two persons have a interdependency relationship if:

- (a) they have a close personal relationship; and
- (b) they live together; and
- (c) one or each of them provides the other with financial support; and
- (d) one or each of them provides the other with domestic support and personal care.

Two people have an interdependency if they have a close personal relationship but do not satisfy the other requirements of an interdependency relationship because either or both of them suffer from physical, intellectual or psychiatric disability.

### Nominated dependant(s) or legal representative(s)

The following are the dependant(s) or legal representative(s) whom I want to receive my super in the event of my death. (If you are nominating your legal personal representative, you need only write 'legal personal representative', and do not need to provide the other details requested below.)

Please nominate the type of beneficiary option you wish to be implemented in the event of your death. (Please select one option.)

### Option 1 - Lump sum to be paid to your nominated beneficiaries.

Please provide names of your preferred beneficiary/ies in the event of your death. You can photocopy this page of the form if you have more than four beneficiary nominations. (Benefit allocations must add up to 100%.)

1. Full name



Relationship      Benefit allocation %

%

2. Full name



Relationship      Benefit allocation %

%

3. Full name



Relationship      Benefit allocation %

%

4. Full name



Relationship      Benefit allocation %

%

### Option 2 - Lump sum to be paid to your estate.

#### Do you wish to make a Binding nomination?

No - my nomination is to be Non-binding  
(go to Section 7)

Yes - my nomination is to be Binding  
(go to Section 8)

## 7. Declaration

The personal information that you have provided on this form will be used by legalsuper to establish your account in accordance with your instructions. If you do not provide the information, the Trustee will not be able to establish an account as you have requested.

Information about how legalsuper uses and discloses the personal information that you provide is contained in the Fund's *Policy for management of personal information*. To access the Fund's policy and your personal details or to make an enquiry about any aspect of your Fund membership, please call legalsuper on freecall **1800 623 502**, visit legalsuper's website at **legalsuper.com.au** or write to legalsuper pension at Locked Bag 5042, Parramatta NSW 2124.

I have read and understood the legalsuper Pension PDS.

I declare that the information in this form is true, and acknowledge responsibility for its completeness and accuracy.

I agree and understand that my pension superannuation arrangements will be governed by prevailing legislation and the terms and provisions of legalsuper's governing rules as in force from time to time.

Member's signature

Date (dd/mm/yyyy)

## 8. Signatures (Binding nomination only)

The following signatures confirm my Binding nomination(s) (my signature plus those of 2 witnesses over the age of 18 who are not included in the preceding nomination(s) in Section 6) and that I have read and understood the information in this form and the legalsuper Pension PDS regarding Binding Death benefit nominations.

I understand that:

- Each beneficiary must be either a dependant as defined in Section 6 or my legal personal representative at the time of my death.
- My beneficiary(ies) and I will be bound by the provisions of the trust deed relating to Binding Death benefit nominations.
- This Binding nomination is only valid for three years from the date I sign it or any confirmation or amendment of it. I accept that should my circumstances change, or those of any of my beneficiaries, it is my responsibility to review my nomination and change it if required.
- I may at any time revoke or change a Binding nomination in accordance with the Fund's procedures.
- If this nomination is invalid or has not been sent to the Trustee when I die, the Death benefit will be paid by the Trustee in its discretion to or for the benefit of one or more of my dependants or my legal personal representative(s) in such proportions between them as the Trustee determines.
- This nomination applies to all my superannuation in legalsuper.
- I have read the above information setting out the terms upon which this nomination is made and agree to be bound by the provisions of the legalsuper trust deed (as amended).

Member's signature

Date (dd/mm/yyyy)

### Two witnesses are required for a Binding nomination (see notes at left).

In witnessing this nomination, I declare that the member signed the nomination above in my presence, I am at least 18 years of age and I am not a beneficiary nor the legal personal representative of the member above.

#### Witness 1

Surname

Given names



Signature

Date of birth (dd/mm/yyyy)

#### Witness 2

Surname

Given names



Signature

Date of birth (dd/mm/yyyy)