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Superannuation member application

Before you complete this application form, you must read the legalsuper *Superannuation Product Disclosure Statement* (PDS), *Employer Sponsored Super & Personal Super Additional Information* Guide and the Target Market Determination (TMD), which include important information about legalsuper. The legalsuper PDS, *Employer Sponsored Super & Personal Super Additional Information* Guide, TMD and all forms that you may require are available free of charge at **legalsuper.com.au** or by calling **1800 060 312** (8am to 8pm [AEST/AEDT] Monday to Friday).

Please use **BLOCK letters and black ink** when completing this form.

This form will be invalid if unsigned or undated by the applicant (see section 8)
Why not join online at legalsuper.com.au?

Return this completed form to either:

Email: mail@legalsuper.com.au
OR
Post: legalsuper
Locked Bag 5081
Parramatta NSW 2124
Phone: 1800 060 312

1. Personal details

☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr ☐ Justice

Surname

Given Names

Date of birth (dd/mm/yyyy)

Residential Address

Town or Suburb

State

Postcode

Postal Address (if different to Residential Address above)

Town or Suburb

State

Postcode

Tax File Number **(refer to Section 7)**

Telephone Number

Mobile Number

Email

Occupation

☐ Judge
☐ Solicitor/Lawyer
☐ Management staff
☐ Administration/Support Staff

Other (please specify)

Employment Status

☐ Self-employed/Not working/Retired
☐ Employed (please complete the rest of this section)

Employer's Name

legalsuper Employer Number (if known)

Date joined Employer (dd/mm/yyyy)

Employer Phone Number

2. Investment options

You can invest in one option or any mix of options. **The percentage for each option can only be up to 2 decimal places and the total must equal 100%**. Please refer to 'Your investment options' in legalsuper's PDS and *Employer Sponsored Super & Personal Super Additional Information* Guide.

Investment Choice Option	Please invest any Future Contributions as follows: % for each Investment Choice
MySuper Balanced[1] (Employer-sponsored member only)	. %
Cash	. %
Conservative	. %
Conservative Balanced	. %
Balanced Index	. %
Balanced	. %
Growth	. %
High Growth	. %
Australian Shares	. %
Overseas Shares	. %
Balanced Socially Responsible	. %
Total	100 . 0 0 %

1. The MySuper Balanced option is the default option for Employer-sponsored members only. For Employer-sponsored members, if you have not provided different instructions your contributions will be invested in the default MySuper Balanced option.

Applications for the Direct Investment Option (DIO) can only be made online via MemberAccess available at **legalsuper.com.au**. Investment in the DIO is subject to investment minimums. Please refer to the Superannuation Product Disclosure Statement (PDS) and *Employer*

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Sponsored Super & Personal Super Additional Information Guide for further details.

We recommend that you seek appropriately qualified professional advice if you need assistance in making an investment choice.

3. Death and Total and Permanent Disablement (TPD) cover

EMPLOYER-SPONSORED MEMBERS ONLY

Subject to meeting the Insurer's eligibility conditions, Employer-sponsored members may receive Death Only or Death and TPD cover at the default cover level upon meeting the PMIF requirements or electing to opt-in early for default cover.

Depending on their eligibility, Employer-sponsored members can also apply for up to 4 additional units of Death Only or Death and TPD cover, taking advantage of a simplified application process by completing the *Special offer to increase insurance* form.

If eligible, this form must be received by legalsuper within 60 days of the issue date stated on the Welcome Letter we send to you.

Members wishing to apply for more than the special offer additional cover need to complete a *Superannuation change details – (insurance)* form available at **legalsuper.com.au**, by calling **1800 060 312** (8am to 8pm [AEST/AEDT] Monday to Friday), or you can apply through MemberAccess.

PERSONAL MEMBERS & SPOUSE MEMBERS ONLY

Subject to meeting the Insurer's eligibility conditions, self-employed persons who are Personal members of legalsuper may receive $250,000 of fixed Death and TPD cover automatically upon meeting the PMIF requirements or electing to opt-in early for default cover. This cover is Limited Cover for a period of at least 24 months. Spouse members of the Fund may only apply for Death Only cover.

Members wishing to apply for higher cover need to complete a *Superannuation change details – (insurance)* form available at **legalsuper.com.au**, by calling **1800 060 312** (8am to 8pm [AEST/AEDT] Monday to Friday), or you can apply through MemberAccess.

4. Salary Continuance cover

Employer-sponsored members and Personal members can protect up to 87% of their Salary (as defined by the Insurer) for either 2 years, 5 years, to age 60, or to age 65. To apply, complete a *Superannuation change details – (insurance)* form.

Note: Employer-sponsored members only can apply for 2 years Salary Continuance cover up to a maximum benefit of $6,000 per month, taking advantage of a simplified application process by completing the *Special offer to increase insurance* form. This form must be received by legalsuper within 60 days of the date of the welcome letter we send to you.

5. Nomination of beneficiary/ies

You may make a Non-binding nomination via MemberAccess.

All members of legalsuper may make a death benefit nomination. The Trustee will consider the most recent valid nomination that you have with legalsuper.

You may elect to make either a Binding or Non-binding nomination of beneficiary/ies to whom your accrued legalsuper entitlements (plus any insurance proceeds) (**Death benefit**) will be paid in the event of your death.

Please note: a death benefit nomination only applies to the particular legalsuper account that you specify that nomination for and the most recent valid nomination will apply only to that particular account.

The most recent valid Non-binding nomination will replace any previous Non-binding nomination for that particular account, whilst the most recent valid Binding nomination will replace any previous Binding or Non-binding nomination for that particular account.

A valid Non-binding nomination of preferred beneficiaries 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 and/or your legal personal representative (estate) on your death. Unless the Trustee decides to pay the benefits to your legal personal representative, your entitlements will not form part of your estate and will therefore not be subject to the terms of your Will.

A valid Binding nomination of beneficiaries will bind the Trustee to pay your entitlements on your death exactly as you specify. Your nomination will only be valid and binding if it is made in accordance with relevant requirements. The requirements include that you sign and date the declaration in section 6 in the presence of two persons over 18 years of age who witnessed you sign and date the declaration, and those witnesses are not included in your nomination. You must submit this form with original signatures. **Please remember:** a Binding nomination is only valid for three years from the date you sign it, confirm or amend it.

The Trustee does not accept any nomination made under any form of Power of Attorney.

You can nominate both individual beneficiaries and a legal personal representative (estate).

'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' means:

Two persons have an interdependency relationship if:

(a) they have a close personal relationship;

(b) they live together;

(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 relationship 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.

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

Lump sum to be paid to your nominated beneficiary/ies (this includes your legal personal representative (estate))

Please select the type of nomination you wish to be implemented in the event of your death:

☐ My nomination is to be Non-binding

☐ My nomination is to be Binding

Please provide the 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 can only be up to 2 decimal places and must add up to 100%. Please complete all parts of this section.**

1

Surname

Given name(s)

Relationship

☐ Spouse ☐ Child ☐ Financial dependant ☐ Interdependent

Date of birth

% of benefits

OR Legal personal representative (write their full name below) % of benefits

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2

Surname

Given name(s)

Relationship

☐ Spouse ☐ Child ☐ Financial dependant ☐ Interdependent

Date of birth

% of benefits

3

Surname

Given name(s)

Relationship

☐ Spouse ☐ Child ☐ Financial dependant ☐ Interdependent

Date of birth

% of benefits

4

Surname

Given name(s)

Relationship

☐ Spouse ☐ Child ☐ Financial dependant ☐ Interdependent

Date of birth

% of benefits

Total must equal 100%

6. Declaration

I acknowledge that:

- I have read and understood the information in this form and the relevant legalsuper PDS regarding nominations.
- Each beneficiary I nominated must be either a dependant as defined in this form or my legal personal representative at the time of my death.
- My beneficiary/ies and I will be bound by the provisions of the legalsuper Trust Deed (as amended) relating to nominations.
- If I made a Binding nomination, it 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 beneficiary/ies, it is my responsibility to review my nomination and change it if required.
- I may at any time revoke or change my nomination in accordance with legalsuper's procedures.
- If this nomination is invalid, or is a non-binding nomination, or has not been received by 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 in such proportions between them as the Trustee determines.
- This nomination will replace any previous valid Binding or Non-binding nomination held by the Trustee for this particular account I have with legalsuper.
- I agree and understand that my 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.
- I have read the above information setting out the terms upon which this nomination is made.
- My nomination was not made under any form of Power of Attorney.

Member's signature

Date (dd/mm/yyyy)

Two witnesses are required for a Binding nomination

In witnessing this nomination, I declare that the member signed and dated the nomination above in my presence, I am at least 18 years of age and I am not nominated above as beneficiary or legal personal representative of the member.

Witness 1

Surname

Given names

Signature

Date (dd/mm/yyyy)

Witness 2

Surname

Given names

Signature

Date (dd/mm/yyyy)

7. Collection of Tax File Numbers (TFN)

Under the *Superannuation Industry (Supervision) Act 1993,* legalsuper is authorised to collect, use and disclose your TFN.

legalsuper may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request legalsuper, in writing, not to disclose your TFN to any other superannuation provider.

Declining to quote your TFN to legalsuper is not an offence. However, giving your TFN to legalsuper will have the following advantages:

- legalsuper will be able to accept all permitted types of contributions to your account/s;
- other than the tax that may ordinarily apply, you will not pay more tax than you need to. This affects both contributions to your superannuation and benefit payments when you start drawing down your superannuation benefits; and
- it will make it much easier to find different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

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8. Declaration

By providing my email and/or phone number, I understand that legalsuper will contact me to provide me with updates about my account. I understand that I can update my contact details and communication preferences in MemberAccess online or by calling **1800 060 312** (8am to 8pm [AEST/AEDT] Monday to Friday).

Before you sign this application form, the Trustee is obliged to give you a Product Disclosure Statement (which is a summary of important information relating to legalsuper). The PDS, *Employer Sponsored Super & Personal Super Additional Information* Guide and the Target Market Determination (TMD) will help you to understand the product and decide if it is appropriate to your needs.

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 complete the sections as detailed on page 1 of this form, legalsuper will not be able to establish your account as you have requested. Information about how legalsuper discloses the personal information that you provide is contained in the Fund's Privacy Policy.

To access the Fund's Privacy Policy and your personal details or to make an enquiry about any aspect of your Fund membership, please call legalsuper on **1800 060 312** (8am to 8pm [AEST/AEDT] Monday to Friday), visit legalsuper's website at **legalsuper.com.au** or write to legalsuper at Locked Bag 5081, Parramatta NSW 2124.

I declare that the information in this form is true, and acknowledge responsibility for its completeness and accuracy. I agree to become a member of legalsuper, and understand that my superannuation arrangements will be governed by the terms and provisions of legalsuper's Trust Deed as in force from time to time and prevailing legislation.

I declare I have obtained, read and understood the information contained in legalsuper's PDS, *Employer Sponsored Super & Personal Super Additional Information* Guide and the Target Market Determination (TMD).

I acknowledge that legalsuper:

(i) will implement any investment instructions as detailed in Section 2.

(ii) is not responsible for my choice of investment strategy or my individual investment selections, or my decision as to whether or when to sell my investments.

(iii) is not responsible for any delays in implementing my instructions.

(iv) will confirm my instructions in writing.

I acknowledge that I should seek independent professional financial advice if I need assistance in understanding my options in completing this form.

☐ Please tick this box to allow legalsuper to use your TFN to find lost super if applicable.

Signature

Date (dd/mm/yyyy)

Confirmation of your account

Once your account has been established with legalsuper, we will confirm your account details, including your insurance cover and your beneficiaries.

If you would like to modify your account, you can go online to MemberAccess at **legalsuper.com.au** or complete and send to us a *Superannuation change details – (personal details and/or investment option[s]),* a *Superannuation change details* – (insurance) form and/or a *Nomination of beneficiary/ies – superannuation form*, depending on which form(s) is relevant to you.

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