

Nomination of beneficiary/ies – pension

Return this completed form to either:

Email: mail@legalsuper.com.au

OR

Post: legalsuper

Locked Bag 5081

Parramatta NSW 2124

Phone: 1800 060 312

You must complete every section of this form.

Your request will be invalid if unsigned and/or undated as set out below.

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

If you make a mistake on this form please use a new form, as otherwise it may not be accepted by the Trustee. You should obtain and read a copy of the relevant legalsuper Product Disclosure Statement (PDS) before you complete this form, as it contains important information. The legalsuper PDS is available at **legalsuper.com.au** or by calling **1800 060 312** (8am to 8pm [AEST/AEDT] Monday to Friday).

You can make non-binding nominations via MemberAccess at legalsuper.com.au 'Login'.

1. My legalsuper member number is

legalsuper membership number

Other legalsuper membership numbers (if any):

2. My personal and contact details previously notified to legalsuper

☐ 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

Occupation

☐ Judge ☐ Barrister ☐ Solicitor/Lawyer

☐ Management staff ☐ Administration/Support Staff

Other (please specify)

3. 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 4 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 to the Trustee.

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:

- 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
- 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:

- they have a close personal relationship;
- they live together;
- one or each of them provides the other with financial support; and
- 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. Please select one option.

☐ **Option 1 – As a reversionary pension to be paid to your nominated dependant***

☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr ☐ Justice

Surname

Given Names

Date of birth (dd/mm/yyyy)

Relationship

* There are restrictions on who may receive your pension as a reversionary beneficiary (refer to the legalsuper Pension PDS).

☐ **Option 2 – 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.**

Surname

1

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

Surname

2

Given name(s)

Relationship

☐ Spouse ☐ Child ☐ Financial dependant ☐ Interdependent

Date of birth % of benefits

Surname

3

Given name(s)

Relationship

☐ Spouse ☐ Child ☐ Financial dependant ☐ Interdependent

Date of birth % of benefits

Surname

4

Given name(s)

Relationship

☐ Spouse ☐ Child ☐ Financial dependant ☐ Interdependent

Date of birth % of benefits

Total must equal 100%

4. 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 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.
- 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)

Please send the original of this form to:

legalsuper
Locked Bag 5081
Parramatta NSW 2124

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