

Beneficiary Nomination Form



MEMBER DETAILS

FULL NAME:

MEMBER NUMBER:

RESIDENTIAL ADDRESS:

DATE OF BIRTH (DD/MM/YYYY):

NOMINATION TYPE

Please select one:

Non-lapsing binding death benefit nomination

This nomination is binding on the Trustee. If you make a valid nomination, the Trustee must pay any super benefit payable to you after your death to the person(s) you have nominated, including the Legal Personal Representative of your estate. Two independent witnesses must sign and date this form. This nomination does not expire.

OR

Non-binding death benefit nomination

This nomination is not binding on the Trustee. If you make a valid nomination, the Trustee will use this as a guide when determining how to pay any super benefit payable to your dependants or estate after your death. This nomination does not expire.

BENEFICIARY DETAILS

Beneficiary 1

TITLE: FIRST NAME:

LAST NAME:

DATE OF BIRTH (DD/MM/YYYY):

% OF BENEFIT:

RELATIONSHIP TO MEMBER:

- Spouse Child Financial dependant
 Interdependency relationship

RESIDENTIAL ADDRESS:

Beneficiary 2

TITLE: FIRST NAME:

LAST NAME:

DATE OF BIRTH (DD/MM/YYYY):

% OF BENEFIT:

RELATIONSHIP TO MEMBER:

- Spouse Child Financial dependant
 Interdependency relationship

RESIDENTIAL ADDRESS:

BENEFICIARY DETAILS (CONT'D)**Beneficiary 3**

TITLE: FIRST NAME:

LAST NAME:

DATE OF BIRTH (DD/MM/YYYY): % OF BENEFIT:

RELATIONSHIP TO MEMBER:

- Spouse Child Financial dependant
 Interdependency relationship

RESIDENTIAL ADDRESS:

Beneficiary 4

TITLE: FIRST NAME:

LAST NAME:

DATE OF BIRTH (DD/MM/YYYY): % OF BENEFIT:

RELATIONSHIP TO MEMBER:

- Spouse Child Financial dependant
 Interdependency relationship

RESIDENTIAL ADDRESS:

Attach the same details of any additional beneficiaries on a separate piece of paper.

Legal Person Representative (My Estate)

% OF BENEFIT:

The total of your nominations must add up to 100%

DECLARATION

I understand that:

- The people listed under the section “Beneficiary Details” of this form must be my spouse, child, financial dependent, interdependent or a legal personal representative of my estate when I die.
- It is my responsibility to ensure that my death benefit nomination remains valid.
- I can change or cancel my death benefit nomination at any time.
- If this nomination is invalid, or has not been received by Cruelty Free Super, when I die my death benefit will be paid at the Trustee’s discretion as guided by superannuation law.
- My beneficiaries and I will be bound by the provisions of the Grosvenor Pirie Master Superannuation Fund - Series 2 Trust Deed, and Cruelty Free Super accepts no responsibility for the correct nomination of beneficiaries.

I have read and understood the information in this form. I have also read the Cruelty Free Super Privacy Policy and Information Collection Notice and I understand how Cruelty Free Super will use my personal information.

SIGNATURE:

DATE (DD/MM/YYYY):

Note: If you have elected a non-lapsing binding death benefit nomination, please complete the Witness Declarations on the following page. The Trustee does not accept non-lapsing binding nominations signed by anyone other than the member.

Please complete this form online, or print, fill out the form, then scan it and save it. Send your completed form to hello@crueltyfreesuper.com.au.

We will confirm by email that your beneficiary nomination has been received.

NON-LAPSING BINDING NOMINATION WITNESS DECLARATION

To ensure this nomination is valid, two witnesses must sign and date this declaration.

I declare that:

- I am 18 years of age or over;
- I am not a nominated beneficiary of this member; and
- This form was signed and dated by the member in my presence.

Witness 1

SIGNATURE:

DATE (DD/MM/YYYY):

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PRINT NAME:

DATE OF BIRTH (DD/MM/YYYY):

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Witness 2

SIGNATURE:

DATE (DD/MM/YYYY):

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PRINT NAME:

DATE OF BIRTH (DD/MM/YYYY):

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Note: The date signed must be the same as the declaration.

Please complete this form online, or print, fill out the form, then scan it and save it. Send your completed form to hello@crueltyfreesuper.com.au.

Legal Personal Representative

Your Legal Personal Representative (LPR) is the executor named in your Will or the administrator of your estate. If you nominate a LPR to receive your super benefit in the event of your death, your LPR will distribute your benefit according to your Will.

Spouse

Your spouse can be a person who is legally married to you, or a person with whom you are in a genuine de facto relationship, regardless of gender.

Children

Your children, of any age, can be your or your spouse's children; adopted, step or ex-nuptial children; or children as defined under the Family Law Act 1975.

Financial Dependent

Being financially dependent does not necessarily mean that the person depends on you totally for financial support. Financial dependency means that at the time of your death, the person relied on you to meet or assist in meeting daily living expenses such as utility and household expenses, rent and shared financial commitments like mortgage repayments or other loans.

Interdependency Relationship

An interdependency relationship exists where you and another person satisfy all of the following four requirements at the time of your death:

- (a) You had a close personal relationship;
- (b) You lived together;
- (c) One or each provided financial support to the other; and
- (d) One or each provided domestic support and personal care to the other.

An interdependency relationship also exists where two people have a close personal relationship, but the other requirements aren't satisfied because either or both persons suffer from a physical, intellectual or psychiatric disability.

Binding Nomination

If you have a valid non-lapsing binding death benefit nomination in place at the time of your death, the Trustee must pay your super benefit as a lump sum to each of your nominated beneficiaries in the proportions you direct. If a person you nominate as a dependant is no longer a dependant at the time of your death, or dies before you do, your non-lapsing binding nomination will no longer be valid and the Trustee will have full discretion over the distribution of the death benefit. In addition, your non-lapsing binding nomination will no longer be valid if your benefit is subject to a court order or family law split. A non-lapsing binding nomination lasts forever and does not need to be updated, unless your circumstances or preferences change. It can be revoked by you at any time.

Non-Binding Nomination

A non-binding nomination confirms your preference of how you would like your super benefit to be paid in the event of your death. The Trustee will take your non-binding nomination into account, but is not bound to follow it and retains absolute discretion in how the benefit is distributed (guided by superannuation law) after your death. A non-binding nomination lasts forever and doesn't need to be updated, unless your circumstances or preferences change it can be cancelled by you at any time.

PRIVACY STATEMENT

The personal information provided on this form is collected by and held for Cruelty Free Super by the fund administrator, OneVue Super Services in accordance with the Australian Privacy Principles of the Privacy Act 1988 (Cth), for the purpose of administering accounts and providing services associated with fund membership.

For further information about how personal information is handled, please call us on 1300 096 631 or visit crueltyfreesuper.com.au/privacy to view the Privacy Policy and Information Collection Notice. The policy contains information about access to and correction of personal information, how a complaint can be made about a privacy breach and other important information about how personal information is collected, used and disclosed.

SAMPLE