

Binding nomination of beneficiaries

Please print in CAPITAL LETTERS and place a cross in any applicable boxes

- 1 For binding nominations, ensure these steps are completed:**
1. You have signed and dated the form.
 2. Your form is witnessed on the same date by two non-beneficiaries.
 3. Your total death benefit percentage totals 100%.
 4. Return your completed form to the North Service Centre.

Client details*

Account number

Title: Dr Miss Mr Mrs Ms

Surname

Given name(s)

Mailing address

Street number and name

Town/Suburb

State

Postcode

Important information about binding nominations

A binding death benefit nomination gives you certainty about who will receive your superannuation benefit in the event of your death.

When you have nominated a beneficiary and the nomination is valid under superannuation law the Trustee must act in accordance with that nomination. The Federal Government has imposed strict conditions on who can be nominated as a beneficiary.

A beneficiary must be:

- a spouse (including de facto spouse or a same sex partner), or
- a child (including an adopted child, step child, the child of the member's spouse or an ex-nuptial child), or
- any person who was wholly or partially financially dependent on you at the date of your death or any person who is, or was at the relevant time, in the opinion of the Trustee in an interdependency relationship with the member (generally a close personal relationship between two people who live together, where one or both provided the other with financial support, domestic support and personal support), or
- a legal personal representative.

If any beneficiary nominated is not a dependent in the opinion of the Trustee and according to superannuation law at the date of your death, this notice will be invalid.

For a binding death benefit nomination notice to be valid your signature must be witnessed by two persons aged 18 years or over, neither of whom is nominated as a beneficiary. A confirmation of a binding death benefit nomination notice does not need to be witnessed.

A binding nomination can be either lapsing or non lapsing. A lapsing binding death benefit nomination is valid for three years if no amendment or revocation is made. The trustee will attempt to contact you before the nomination expires to ask you to confirm your nomination. A non lapsing binding death benefit nomination will not expire unless an amendment or revocation is made. You should review your nomination regularly to make sure it's still right for you. The Trustee accepts no liability for any failure on your part to do so.

A binding death benefit may be amended or revoked at any time. You should update your binding death benefit nomination if there is a change to your personal circumstances.

If you nominate your legal personal representative, please ensure you have a valid and up-to-date will. If you die without a will, the Trustee is required to pay the benefit to a court-appointed administrator who will pay the benefit in accordance with a statutory formula, which varies from state to state. This can result in some classes of beneficiary being excluded (such as de facto spouse).

Type of nomination

- Non binding nomination Binding nomination – non lapsing Binding nomination – lapsing

Nominated beneficiary details

Legal Personal Representative % of benefit

AND/OR

Nomination 1

Gender: Male Female
Relationship to investor: Child Spouse Financial dependant Interdependent % of benefit
Surname Given name(s) Date of birth

Address
Street number and name Town/Suburb State Postcode

Nomination 2

Gender: Male Female
Relationship to investor: Child Spouse Financial dependant Interdependent % of benefit
Surname Given name(s) Date of birth

Address
Street number and name Town/Suburb State Postcode

Nomination 3

Gender: Male Female
Relationship to investor: Child Spouse Financial dependant Interdependent % of benefit
Surname Given name(s) Date of birth

Address
Street number and name Town/Suburb State Postcode

Nomination 4

Gender: Male Female
Relationship to investor: Child Spouse Financial dependant Interdependent % of benefit
Surname Given name(s) Date of birth

Address
Street number and name Town/Suburb State Postcode

Nomination 5

Gender: Male Female
Relationship to investor: Child Spouse Financial dependant Interdependent % of benefit
Surname Given name(s) Date of birth

Address
Street number and name Town/Suburb State Postcode

Declaration

I have read the above information and understand these conditions. I direct the approved Trustee to accept my Binding nomination of beneficiaries for my account.

Member's name

Member's signature

Date

Witness declaration

Witness A – I declare the above notice was signed and dated by the member in my presence and that I am aged 18 years or older.

Witness name

Signature

Date

Witness B – I declare the above notice was signed and dated by the member in my presence and that I am aged 18 years or older.

Witness name

Signature

Date

Your nominated beneficiary is not recorded as binding until the Binding nomination of beneficiaries form is signed, witnessed and sent to the North Service Centre for validation by the Trustee.

Where to send this completed form

North Service Centre
GPO Box 2915
MELBOURNE VIC 3001
north@amp.com.au

Any questions?
1800 667 841