

DEATH BENEFIT – Nomination of Beneficiaries Form

The information contained in this form does not constitute general or individual advice. We strongly recommend that you seek professional advice from an appropriately qualified person before making any nomination.

1. Member Details

Full Fund Name	McLeary Superannuation Fund		
Surname	McLeary		
Given Names	Shirley	Date of Birth	06/01/1939
Address	54 Currong Street		
City /State /Post Code	Kenmore QLD 4069		
Home Phone	()	Mobile	
Work Phone	()	Email	

2. Nominated Beneficiaries

Please refer to the information overleaf before completing this form.

- I wish to: ☐ Make a new nomination thereby revoking all prior binding or non-binding nominations
- This is: ☒ A 3 year Binding Nomination
- ☐ A Non-lapsing Binding Nomination
- ☐ A Non-Binding Nomination

Who would you like your benefit to be paid to in the event of your death? (In the event that you want to nominate more than one beneficiary please provide an additional nomination ensuring the percentage of benefits does not exceed 100%)

A. Beneficiary

Full Name	IAN ALFRED McLEARY				
Address	54 CURRONG ST				
City	KENMORE	State	QLD	Post Code	4069
Date of Birth	04/03/1938				
Relationship to you (ie spouse, child, other financial dependant, interdependency relationship)	SPOUSE				
Percentage of Benefit	100 %				

OR ☐ Legal Personal Representative

In the event that above Nominated Beneficiary predeceases me please pay my benefit as follows:

- ☐ Legal Personal Representative
- ☐ Alternate Beneficiaries – listed below

*** IMPORTANT INFORMATION ***

(A PRECIS)

Please Read the Following Information Carefully

Member Options

You may choose to make either a **Binding, Non-lapsing Binding** or a **Non-binding** nomination. The differences between these types of nomination are set out below:

A. Binding Nomination

- Your valid **binding nomination** is a legal instruction to the Trustee/s to who the death benefit must be paid and the amount. The beneficiaries must be your 'dependants' and/or the Legal Personal Representative of your Estate.
- A binding nomination is valid for three years from the date it is made. The nomination will become a non-binding nomination after three years unless a new binding nomination is signed.
- A valid binding nomination must be signed by you in the presence of two witnesses who must each sign and date the declaration where indicated at the bottom of the form and state their full name and date of birth. **The witnesses must be over 18 and must not be nominated beneficiaries.**
- An invalid binding nomination will be treated as a non-binding nomination by the Trustee/s and will **NOT** revoke or replace an existing valid binding nomination.

OR

B. Non-lapsing Binding Nomination

- Your valid **non-lapsing binding nomination** is a legal instruction to the Trustee/s as per a binding nomination.
- A valid non-lapsing binding nomination is valid until revoked or replaced by the member.
- All other conditions as per binding nomination

OR

C. Non-Binding Nomination

- A **non-binding nomination** is an expression of your wishes to be taken into account knowing the *Trustee/s has complete discretion* in deciding who will receive the death benefit and the amount(s) that they will receive. The benefit may be paid to one or more of your 'dependants' in whatever proportion(s) the Trustee/s thinks fit **and/or** may be paid to the Legal Personal Representative of your Estate to be distributed in accordance with your Will.
- A non-binding nomination is valid for the whole term of Fund membership unless another valid nomination is lodged with the Trustee/s.
- A non-binding nomination does not need any witness signatures.

OR

D. No Nomination

- If you do NOT make a nomination, the benefit will be paid at the discretion of the Trustee/s to the dependant(s) and/or your Legal Personal Representative to be distributed as part of your Estate.