

# CATHOLIC SUPER

## Binding death benefit nomination form



**Address:** GPO Box 2163 Melbourne VIC 3000

**Phone:** 1300 550 273 **Fax:** (03) 9648 4720 **Email:** info@csf.com.au **Internet:** www.csf.com.au

Please use BLOCK letters and black ink when completing this form. This request will be invalid if unsigned.

To make a binding nomination, or to replace an earlier nomination, or to add to existing nomination(s), complete the details in 'Beneficiary details' listing ALL those you wish to be beneficiaries of your Catholic Super death benefit. If you are adding beneficiaries, ensure that you include those previously nominated as well as your new beneficiary(ies). Please ensure that the percentage column totals 100%.

### Section A: Personal details

Mr/Mrs/Ms/Miss/Dr/Rev	Surname										
Given Names											
Date of Birth (DD/MM/YYYY)				Sex	Catholic Super Member Number						
Telephone				Mobile							
Email											
Street Number			Street Name / PO Box								
Suburb / Town							State		Postcode		

### Section B: Beneficiary details

Name	% of Benefit	Relationship	Address	Date of Birth
				/ /
				/ /
				/ /
				/ /
				/ /
				/ /
				/ /
Total	100%			

### Section C: Member declaration

I hereby declare that to the best of my knowledge and belief, the information I have provided is true and correct. Where I have completed the Binding Death Benefit Nomination form;

- I cancel any earlier written binding death nomination made to the Trustee by me and it is my intention that this nomination will be binding on the Trustee as permitted by law.
- I give the Trustee notice that on my death, my death benefit (if any) payable from my Catholic Super account shall be paid in the proportion to any one or more of my dependants or interdependants listed above or my legal representative.
- This binding nomination is valid for 3 years from the date I have signed this form.
- I may at any time cancel or change a binding nomination notice in accordance with Catholic Super's procedures.
- If a notice is invalid or has not been sent to the Trustee when I die the death benefit will be determined by the Trustee at its discretion.
- This nomination applies to all my benefits with Catholic Super.
- I have read the notes on the back of this form which sets out the terms upon which this nomination is made and I understand that these are consistent with the Catholic Super Trust Deed, a copy of which is available upon request.

Signature

Date (DD/MM/YYYY)

492.7 1007 01 1

## Section D: Witness declaration

I hereby declare that I am over the age of 18 years, I am not a beneficiary nominated on this form and I witnessed the member sign the binding nomination form.

Signature of Witness 1



Printed Name

Date (DD/MM/YYYY)

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Date of birth (DD/MM/YYYY)

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Signature of Witness 2



Printed Name

Date (DD/MM/YYYY)

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Date of birth (DD/MM/YYYY)

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### Important notice

#### Binding death benefit nominations

To provide greater certainty about who receives your benefit when you die, you can make a nomination that binds Catholic Super's Trustee to pay your death benefit to specified persons (providing you are still a member of the fund when you die).

The person(s) you nominate must be any one or more of the following:

- Your current spouse (including a de facto)
- Your children (including step, adopted or ex-nuptial)
- Any person(s) financially dependent on you
- Any person who satisfies the death benefit interdependency definition
- Your legal personal representative, which means the executor or administrator of your estate.

It is important to note that all nominated beneficiaries must be alive and fall within one of these categories after your death.

#### How long is the nomination valid?

If you make a binding nomination, it will be valid for three years from the date you sign this form. It is important that you update your nomination regularly to ensure that your wishes are met. You may renew, change or cancel your nomination at any time.

If your nomination is valid, we must follow it no matter how your circumstances have changed. For example, if you nominate your husband or wife and you later separate, but have not yet obtained a divorce, your nomination remains valid and binds the Trustee unless you vary or cancel it, or it expires.

Yours dependants have the right to complain to the Superannuation Complaints Tribunal (SCT) about the Trustee's decision. The SCT will review the decision and all supporting documentation and may be able to change the decision in some circumstances (for example, if the nomination had expired at the date of death).

#### What is a valid nomination?

To make a nomination valid, you must also follow these procedures. Your nomination must:

- Be made to us in writing on the application form
- Clearly set out the proportion of the benefit to be paid to each person nominated (total must add up to 100 per cent)
- Be signed and dated by you in the presence of two witnesses over the age of 18 who are not nominated in the form
- Be signed and dated by the two witnesses in your presence
- Be sent to us (a nomination will not be valid until we receive it).

You may also wish to inform your nominated beneficiaries of your nomination.

#### How do I update my binding nomination?

If you want to make or cancel a binding nomination, you must follow the procedures as outlined below.

- **Make a new nomination:** If you want to make a nomination, you must write your chosen beneficiaries' details in Section B of the form. Your beneficiaries must be your spouse (legal or de facto), child (including adopted or step-children), financial dependant, or legal personal representative, and the 'percentage of benefit' column must total 100 per cent. The form must be signed, dated and witnessed.
- **Cancel a nomination:** If you want to cancel a current binding nomination and not replace it, you must write 'cancel previous nomination' in the 'Beneficiary details' section of the form. Please note that the form must still be signed, dated and witnessed to cancel a previous nomination.

We will write to you to confirm your new or cancelled nomination. We will also write to you seeking your instructions prior to the expiry of any existing nomination. You will be advised of your nomination each time we send your Annual Statement, and be provided with the opportunity to update your nomination. Additional Binding Death Benefit Nomination forms can be obtained from Catholic Super by calling 1300 550 273.

#### Default option

If, at the time of your death:

- You have not made a binding death nomination, or
- Your nomination has been cancelled or
- Your nomination is invalid (for example, it is not correctly signed and witnessed, it is more than three years old and has not been renewed, or any of the people nominated dies before you or no longer falls within one of the permitted categories),

the Trustee of Catholic Super will use its discretion to determine how your benefit should be paid.

#### Is there a fee for binding nominations?

Catholic Super charges no fee to process a binding death benefit nomination.

#### Privacy

Catholic Super only collects information on this form that is essential for the administration of your binding death benefit nomination. Catholic Super will not use the information about you, or your witnesses, for any other purpose, or pass it to any other organisations without express permission.

You should consider consulting your legal adviser before making or cancelling a binding death benefit nomination.

Return the completed, signed and dated application to:

Catholic Super  
GPO Box 2163  
Melbourne VIC 3001

469.9 0707 01 2