

### GUIDE TO COMPLETING THIS FORM

- > Please complete this form to make a new, confirm or revoke a binding death benefit nomination. You should also read the 'What happens when you die?' or the 'Estate planning' section in the PDS before completing this form.
- > Complete this form using **black pen** – print in clear **CAPITAL LETTERS** and any amendments must be initialled.
- > Once completed, follow the instructions on the back page to return your form to Advance.
- > Questions? Call our Customer Relations team on **1800 819 935** or email [investorservices@advance.com.au](mailto:investorservices@advance.com.au).
- > **Note:** Privacy laws protect your privacy. Please read our Privacy Policy for more information. You can obtain a copy from our website [advance.com.au](http://advance.com.au).

### INFORMATION ON COMPLETING THIS FORM

#### Make a new binding death benefit nomination

- > Unless you revoke a binding death benefit nomination, it will remain valid for a period of three years from the date you first signed, last confirmed or amended it. If a binding death benefit nomination ceases to be valid it will not be binding on the Trustee and the Trustee will have the discretion to determine to whom your death benefit is paid, although the nomination will be taken into consideration.
- > You can change or revoke your nomination at any time. Making a new binding death nomination will replace an existing binding death benefit nomination. Your current nomination will be revoked upon acceptance of the new binding death nomination.
- > You can only nominate an 'eligible dependant(s)' and/or your estate. An eligible dependant includes:
  1. Your spouse (including a person who, although not legally married to you, lives with you on a genuine domestic basis as a couple or in a relationship that is registered under certain state or territory laws, as the case may be)
  2. Your child (including an adopted child, a stepchild or ex-nuptial child including adult children whether or not financially dependant on you)
  3. Anyone with whom you have an interdependency relationship at the time of your death (refer to the 'What happens when you die' or the 'Estate planning' section in the PDS for more information),
  4. Any other person financially dependent on you at the time of your death.
- > An assessment of whether a person is an eligible dependant at the time of your death is based on evidence subsequently supplied to the Trustee.
- > You should ensure that your death benefit nomination is kept up to date as your circumstances change. These circumstances may include divorce, marriage, the birth of a child, the death of a nominated beneficiary and other changes in your personal circumstances. If in doubt, contact your financial adviser.

#### Confirm an existing binding death benefit nomination

- > A binding death benefit nomination can only be confirmed before it expires. If it has expired, you will need to make a new binding death benefit nomination.
- > Once a valid confirmation is received from you, your nomination will be valid for three years from the date the form is signed. You do not need a witness to confirm.

#### Revoke a current binding death benefit nomination

- > If you are revoking your current binding death benefit nomination, you must sign and date the investor declaration section in the presence of two witnesses. Each witness must have turned 18 years of age and neither of them can be a beneficiary under the nomination being revoked. Each witness must also sign and date the witnesses' declaration section. You will then no longer have a valid nomination and the revoked nomination will not be taken into consideration by the Trustee when making any death benefit determination.
- > To replace existing binding death benefit nomination, simply make a new binding death nomination. Your current nomination will be revoked upon acceptance of the new binding death nomination.

#### Checklist

- Ensure the total nomination allocated to your beneficiaries and/or estate equals 100% (otherwise the request will be invalid).
- Ensure that you have signed and dated this form.
- If you are making or revoking a binding death benefit nomination, ensure that the form has been signed by two witnesses.
- Ensure that the beneficiaries have not signed as witnesses.
- Ensure that your witnesses have signed and dated this form at the same time you signed the form.

### 1. NOMINATION DETAILS – MANDATORY

Cross **[X]** the relevant box.

- Make a new binding nomination – complete Sections 2, 3, 4 and 5.
- Confirm an existing binding nomination – complete Sections 2 and 4.
- Revoke a current binding nomination – complete Sections 2, 4 and 5.

### 2. ACCOUNT DETAILS – MANDATORY

Account type. Cross **[X]** the relevant box.

Super  Pension

Account number

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Date of birth (dd/mm/yyyy)

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Account name



### 3. NOMINATED BENEFICIARIES

You can nominate up to five beneficiaries, including your Estate.

Please use whole figures when specifying the '% of benefit'.

**! YOUR TOTAL NOMINATION MUST EQUAL 100%.**

**! YOUR REQUEST WILL BE INVALID IF THE TOTAL NOMINATION (% OF BENEFIT) DOES NOT EQUAL 100%.**

Full name* of beneficiary	% of benefit
<b>Dependant 1</b> <input type="text"/> Relationship Spouse <input type="checkbox"/> De facto spouse <input type="checkbox"/> Child <input type="checkbox"/> Interdependency relationship <input type="checkbox"/> Financial dependant <input type="checkbox"/>	_____ %
<b>Dependant 2</b> <input type="text"/> Relationship Spouse <input type="checkbox"/> De facto spouse <input type="checkbox"/> Child <input type="checkbox"/> Interdependency relationship <input type="checkbox"/> Financial dependant <input type="checkbox"/>	_____ %
<b>Dependant 3</b> <input type="text"/> Relationship Spouse <input type="checkbox"/> De facto spouse <input type="checkbox"/> Child <input type="checkbox"/> Interdependency relationship <input type="checkbox"/> Financial dependant <input type="checkbox"/>	_____ %
<b>Dependant 4</b> <input type="text"/> Relationship Spouse <input type="checkbox"/> De facto spouse <input type="checkbox"/> Child <input type="checkbox"/> Interdependency relationship <input type="checkbox"/> Financial dependant <input type="checkbox"/>	_____ %
<b>and/or Estate</b>	_____ %
<b>TOTAL</b>	<b>100%</b>

\* As appears on birth certificate or driver's licence.

**! ENSURE THAT YOU AND YOUR WITNESSES HAVE SIGNED AND DATED THE DECLARATION ON THE NEXT PAGE.**



**4. INVESTOR DECLARATION – MANDATORY**

**!** IF YOU ARE MAKING OR REVOKING A BINDING DEATH BENEFIT NOMINATION, THIS FORM MUST BE SIGNED AND DATED IN THE PRESENCE OF TWO WITNESSES.

**!** A NOMINATED BENEFICIARY CANNOT BE A WITNESS.

I have read the information on completing this form and confirm my nomination indicated under Section 1 Nomination details.

Signature

Date (dd/mm/yy)

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**5. WITNESSES' DECLARATION – MANDATORY WHEN MAKING OR REVOKING A BINDING DEATH BENEFIT NOMINATION**

**!** MUST BE SIGNED AND DATED AT THE SAME TIME THE INVESTOR DECLARATION IS SIGNED.

**!** YOUR REQUEST WILL BE INVALID IF ALL THREE DATES ARE NOT THE SAME.

We declare that:

- > We have turned 18 years of age and we are not nominated beneficiaries for this account.
- > This nomination/revocation was signed by the investor in our presence.

**Witness 1:** Full name

Signature

Date (dd/mm/yy)

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**Witness 2:** Full name

Signature

Date (dd/mm/yy)

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**SEND THIS COMPLETED FORM TO:**

By Post: Advance Asset Management  
GPO Box B87  
Perth WA 6838  
By Fax: 08 9481 4318

**FOR FURTHER ASSISTANCE CONTACT:**

**CUSTOMER RELATIONS**  
1800 819 935  
**FAX**  
08 9481 4318

**EMAIL ADDRESS**  
investorservices@advance.com.au  
**INTERNET ADDRESS**  
advance.com.au

**ADVANCE**  
ASSET MANAGEMENT



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