# Advance Retirement Suite – Super/Pension

Binding Death Benefit Nomination - New, Confirm or Revoke

Trustee: BT Funds Management Ltd (BTFM) ABN 63 002 916 458 AFSL 233724



# **GUIDE TO COMPLETING THIS FORM**

Use 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 in BLOCK LETTERS by typing directly into the form or using black pen, print and sign it in the presence of two witnesses on the same day. 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 Monday to Friday, between 8.30am and 7.00pm, Sydney time (8.00pm during daylight savings time) or email investorservices@advance.com.au
- Note: Privacy laws protect your privacy. Read our Privacy Policy for more information. You can obtain a copy from our website 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)
  - 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),
  - 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

Checklist

- > 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.

	nsure the total nomination allocated to your beneficiaries and/or state equals 100% (otherwise the request will be invalid).				
E	nsure 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.				
E	nsure that the beneficiaries have not signed as witnesses.				
	nsure that your witnesses have signed and dated this form at the ame 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.				
c	Confirm an existing binding nomination – complete Sections 2 and 4.				
R	evoke a current binding nomination – complete Sections 2, 4 and 5.				
2	ACCOUNT DETAIL C. MANDATODY				
	ACCOUNT DETAILS - MANDATORY				
	nt type. Cross [ <b>X</b> ] the relevant box.				
Super	Pension Pension				
Accou	nt number				
'					
Date o	of birth (dd/mm/yyyy)				
Accou	nt name				



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# 3. NOMINATED BENEFICIARIES

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

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

	n	
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YOUR TOTAL NOMINATION MUST EQUAL 100%.

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

Full name* of beneficiary	% of benefit
Dependant 1	
	0/
Relationship	%
Spouse De facto spouse Child Interdependency relationship Financial dependant	
Dependant 2	
	%
Relationship	
Spouse De facto spouse Child Interdependency relationship Financial dependant	
Dependant 3	
	%
Relationship	
Spouse De facto spouse Child Interdependency relationship Financial dependant	
Dependant 4	
	%
Relationship	
Spouse De facto spouse Child Interdependency relationship Financial dependant	
and/or Estate	%
TOTAL	100%

<sup>\*</sup> 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.



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# 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)

5.	WITNESSES' DECLARATION - MANDATORY WHEN MAKING
	OR REVOKING A BINDING DEATH BENEFIT NOMINATION
•	MUST BE SIGNED AND DATED AT THE SAME TIME THE
V	INVESTOR DECLARATION IS SIGNED.

	YOUR REQUEST WILL BE INVALID IF ALL THREE DATES
U	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)
Witness 2: Full name	
Signature	
	Date (dd/mm/yy)

### SEND THIS COMPLETED FORM TO US:

Online: Using our secure Document Upload facility on

Investor Online or AdviserNET

(accessed from Forms > Document Upload menu)

By Post: Advance Asset Management

GPO Box B87, Perth WA 6838

By Email: investorservices@advance.com.au

**By Fax:** (08) 9481 4834

FOR FURTHER ASSISTANCE CONTACT:

**CUSTOMER RELATIONS** 

1800 819 935

FAX

(08) 9481 4834

EMAIL ADDRESS

investorservices@advance.com.au

INTERNET ADDRESS

advance.com.au

ADVANCE ASSET MANAGEMENT

If you submit online, email or fax, you don't need to post us the original.



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