

MAKING, CHANGING OR CANCELLING A NON-BINDING DEATH NOMINATION



Please read the following **Important information** for details on how to make a non-binding nomination.

WHO CAN YOU NOMINATE?

You can nominate as many beneficiaries as you like, as long as each beneficiary falls into at least one of the following categories:

- **Your spouse** – a person who is married to you [valid under the *Marriage Amendment Act 2017* (CTH)], a person who lives with you on a genuine domestic basis in a relationship as a couple or a person (whether of the same sex or different sex) with whom you are in a relationship that is registered under a law of a State or Territory.
- **Your children** – including adopted, step or ex-nuptial, a child of your spouse and someone who is your child within the meaning of the Family Law Act 1975.
- **Another dependant**, defined as:
 - A person who is wholly or partially financially dependent on you, or
 - A person in an interdependent relationship with you.Two people will have an interdependency relationship if:
 - they live together;
 - they have a close personal relationship; and
 - one or each of them provides the other with financial and domestic support and personal care.
- **Your Legal Personal Representative** – the executor of your will or administrator of your estate.

Interdependency can also apply in the case where a close personal relationship exists but the other requirements for interdependency are not satisfied because either or both people suffer from a physical, intellectual or psychiatric disability.

- **Your Legal Personal Representative** – the executor of your will or administrator of your estate.

The most appropriate nomination will depend on your personal circumstances. As there may be taxation, Centrelink, asset protection and other implications to consider, we recommend that you seek professional legal, taxation and financial advice before making your nomination.

HOW DOES A NON-BINDING NOMINATION WORK?

This type of nomination is **not binding** on the Trustee, meaning the Trustee has the discretion to decide who will receive your Death benefit. On your death, the Trustee will consider your nomination but will take into account a range of other factors (such as the personal circumstances of your dependants) when making a decision about which one or more of your dependants or Legal Personal Representative, or other persons if no dependants or Legal Personal representative can be located, will receive your benefit.

It is important that you review your nomination regularly and consider updating your nomination whenever your personal circumstances change.

You may change or cancel your nomination at any time.

HOW DO YOU UPDATE YOUR NON-BINDING NOMINATION?

If you want to make, replace or cancel a non-binding nomination, you must follow these procedures:

• **Make or replace a nomination:**

If you want to make a non-binding nomination, you must write all your chosen beneficiaries' details in the **Beneficiary details** section of this form and the **Percentage of benefit** column must total 100%. The form must be signed and dated.

You may instead choose to make a Binding, Non-lapsing or, for an Income Stream account, a Reversionary Death Benefit nomination which will replace your Non-binding nomination. To make these types of nominations, please complete and return the relevant form, available on the Energy Super website at energysuper.com.au

• **Cancel a nomination:**

If you want to cancel a current non-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 and dated.

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

We will write to you to confirm your new, replacement or cancelled nomination.

You will be advised of your nomination each time we send your Annual Statement so you can consider if it still reflects your wishes. Additional *Non-binding Death Benefit Nomination* Forms can be obtained from the Fund or you can download one from the Energy Super website at energysuper.com.au

We will write to you to confirm your new, replacement or cancelled nomination.

You will be advised of your nomination each time we send your Annual Statement so you can consider if it still reflects your wishes. Additional *Non-binding Death Benefit Nomination* Forms can be obtained from the Fund or you can download one from the Energy Super website at energysuper.com.au

IS THERE A FEE FOR MAKING A NOMINATION?

We do not charge a fee to process any type of death benefit nomination.

DO YOU WANT MORE INFORMATION?

Before making, replacing or cancelling your nomination you should read the Product Disclosure Statement relevant to you and consider consulting your legal, taxation and financial advisers.

NON-BINDING DEATH BENEFIT NOMINATION FORM



To make a non-binding nomination, or to replace an existing nomination, please complete this form.

If you'd like to make a Binding, Non-lapsing or, for Income Stream accounts only, Reversionary death benefit nomination, please complete the relevant form, available on our website at energysuper.com.au

Make sure you list ALL the names of the persons you wish to be beneficiaries of your Energy Super Death benefit in the **beneficiary details** section below. If you are adding beneficiaries, ensure that you include those previously nominated as well as your new beneficiary(ies).

Please complete the form in **BLOCK** letters using a blue or black pen. Print an 'X' to mark boxes where applicable.

YOUR PERSONAL DETAILS	
Energy Super member number* (if known): <input type="text"/>	Postal address (if same as residential address, write "as above"): <input type="text"/>
Surname: <input type="text"/>	<input type="text"/>
Title: Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Dr <input type="checkbox"/>	State: <input type="text"/> Postcode: <input type="text"/>
Given names: <input type="text"/>	Telephone (home): <input type="text"/>
Date of birth: (DD/MM/YYYY) <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Telephone (work): <input type="text"/>
Residential address: <input type="text"/>	Mobile: <input type="text"/>
<input type="text"/>	Primary email: <input type="text"/>
State: <input type="text"/> Postcode: <input type="text"/>	Secondary email: <input type="text"/>

*Please note you must complete a separate form for each account you hold.

BENEFICIARY DETAILS

The Trustee will take your wishes into account, but is not bound by your nomination. In the event of your death the Trustee will take into account a range of other factors (such as the personal circumstances of your dependants) when making a decision about who will receive your Death benefit. Please refer to the **Important information** section regarding who you can nominate.

The percentages allocated to each beneficiary must total 100% or this nomination will not be valid.

FULL NAME OF BENEFICIARY	DATE OF BIRTH (DD/MM/YYYY)	ADDRESS	RELATIONSHIP TO YOU	% OF BENEFIT
				%
				%
				%
				%
				%
				%
				%
				%
				%
				%
				%
Your Legal Personal Representative (Executor or Administrator of your Estate)				%
Total				100%

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MEMBER DECLARATION

I understand that the Trustee will take my wishes into account but is not bound by my nomination.

I understand that I should review my nomination regularly and as my circumstances change (e.g. separation, start of a new relationship, birth of a child or death of a beneficiary) to ensure it always reflects my wishes.

I hereby declare that to the best of my knowledge and belief, the information I have provided is true and correct.

I acknowledge that the Fund collects my personal information when I complete this *Non-Binding Death Benefit Nomination* Form, and confirm that I have read and understood the Privacy Statement set out on page 3.

Member's signature:

Date: (DD/MM/YYYY) //

Please return your completed form, signed and dated, to the Fund. It is advisable to keep a copy.

PRIVACY STATEMENT – YOUR PRIVACY IS IMPORTANT TO US

LGIAsuper (the issuer of the Energy Super product) respects your privacy. All personal information collected via this form is protected in line with LGIAsuper's Privacy policy. To find out more about how we collect and manage your personal information, please refer to our privacy policy available at energysuper.com.au.

RETURN THIS FORM

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F 07 3229 7523

E member@energysuper.com.au
(as a scanned email attachment)

TALK TO US

T 1300 436 374

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