

Nomination of beneficiaries

Please complete this form to make, change or revoke a binding or non-binding nomination.

RED SECTIONS FOR YOUR INFORMATION

GREY SECTIONS TO FILL OUT

Before you start

- Read the **Important Information section** at the end of this form to understand the different type of nominations and who is eligible to be nominated as a beneficiary
- If you are making a binding nomination, you must ensure that all requirements listed in **section 4** are completed
- Any changes to your nomination will take effect from the date the form is processed by TelstraSuper.

1. Your Details

YOUR BASIC INFO



Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Miss	<input type="checkbox"/> Ms	<input type="checkbox"/> Other		
Surname				Member number			
Given name(s)				Date of birth			
Residential address (PO Box not acceptable)							
Suburb				State			
Postcode							
Mobile				Daytime contact no.			
Email address							

2. Nomination details

DETAILS



Please tick one option only.

I wish to make or change a binding nomination (*complete sections 3, 4 and 5*)

OR

I wish to make or change a non-binding nomination (*complete sections 3 and 5*)

OR

I wish to revoke my current binding nomination and no other nomination is required (*complete sections 4 and 5*)

OR

I wish to revoke my current non-binding nomination and no other nomination is required (*complete section 5 only*)

P.T.O



We're here to help

If you have any questions or would like to talk to a financial adviser from TelstraSuper Financial Planning, please call us on 1300 033 166.

3. Binding or non-binding beneficiary nomination

See the Important Information section at the end of this form about who you can nominate as your beneficiary. This nomination will override any existing binding or non-binding nomination you have. If you want to make a binding nomination, you must complete **section 4**.

Nominated percentages must total 100% or all nominations will be invalid

Full name of beneficiary	Relationship to you Select one option only for each beneficiary		% of total benefit Whole numbers only
1. <input type="text"/>	<input type="checkbox"/> Spouse <input type="checkbox"/> Child	<input type="checkbox"/> Financial dependant <input type="checkbox"/> Interdependency relationship	<input type="text"/> % +
2. <input type="text"/>	<input type="checkbox"/> Spouse <input type="checkbox"/> Child	<input type="checkbox"/> Financial dependant <input type="checkbox"/> Interdependency relationship	<input type="text"/> % +
3. <input type="text"/>	<input type="checkbox"/> Spouse <input type="checkbox"/> Child	<input type="checkbox"/> Financial dependant <input type="checkbox"/> Interdependency relationship	<input type="text"/> % +
4. <input type="text"/>	<input type="checkbox"/> Spouse <input type="checkbox"/> Child	<input type="checkbox"/> Financial dependant <input type="checkbox"/> Interdependency relationship	<input type="text"/> % +
5. Legal personal representative (your estate)	To have part or all of your benefit paid to your estate		<input type="text"/> % +
TOTAL must total 100%			<input type="text"/> % =

To nominate more beneficiaries please attach a separate sheet with their details. If you are making a binding nomination, the sheet must be signed and dated by you and your witnesses on the same date as this form.

4. Witness declaration (binding nomination only)

By signing this form each witness makes the following declaration:

- I am over 18 years old
- I am not named as a beneficiary
- I witnessed the member sign and date this form in my presence

Signature of Witness 1

X

Full name of Witness 1

Signature of Witness 2

X

Full name of Witness 2

The date below must match the date of the member's signature in Section 5

Date

Date

5. Member declaration and signature

By signing this declaration, I acknowledge that:

- I have read the Important Information section and have nominated one or more of my dependants and/or legal personal representative
- Each dependant nominated must be my dependant at the date of my death
- 100% of my benefit must be allocated and the allocation must be clearly set out
- My beneficiary nomination can be changed or amended at any time
- My beneficiary nomination will take effect from the date the form is processed by TelstraSuper
- If I have made a binding nomination:
 - it will expire 3 years after the date it is signed
 - that is not valid or in effect at the date of my death, the Trustee must pay my benefit to one or more of my dependants or legal personal representative in the proportions it determines.

Name

Signature X

Date



Types of nominations

Binding nomination – a valid binding death benefit nomination gives you certainty about who will receive your benefit in the event of your death and means TelstraSuper must pay your death benefit to the beneficiaries nominated in the proportion set out in the nomination. To be valid and in effect, all the following conditions must be met:

- each person nominated must be a dependant or the legal personal representative
- the allocation amongst the beneficiaries must be clearly set out
- the total percentage of the benefit allocated to the beneficiaries nominated must equal 100%
- the nomination form must be signed and dated by two witnesses who are both aged 18 or over and are not named as beneficiaries on this form
- must contain a declaration signed and dated by the witnesses stating that notice was signed and dated by the member in their presence

A binding nomination remains in effect for 3 years after the date it was first signed or last confirmed/amended.

Non-binding nomination – a non-binding nomination is not binding on TelstraSuper, but it will be taken into consideration when determining whom to pay your death benefit to.

Other information

Your binding or non-binding nomination will be effective across all your TelstraSuper accounts, except a *TelstraSuper RetireAccess*[®] Retirement income stream where you have nominated a reversionary beneficiary.

Each dependant nominated must be a dependant at the date of your death. If your personal circumstances change (e.g. you marry, divorce, have a child or enter a de facto relationship), please ensure that you make a new binding nomination.

If your binding nomination is not valid or in effect at the date of your death, TelstraSuper must pay your benefit to one or more of your dependants or legal personal representative in any proportion determined by TelstraSuper.

Who can be nominated as a beneficiary?

You can nominate one or more of your dependants or your legal personal representative as your beneficiaries.

Your dependants are:

- **spouse** – a person to whom you are legally married, a person whether of the same or a different sex with whom you are in a relationship that is registered under an Australian State or Territory law, or a person whether of the same or a different sex with whom you are not legally married but who lives with you on a genuine domestic basis as a couple.
- **child** – your child (or your spouse's child) of any age, including an adopted child, a step-child or an ex-nuptial child, or a child within the meaning of the Family Law legislation.
- **financial dependant** – any other person totally or partially financially dependent upon you at the time of your death.
- **interdependency relationship** – any other person with whom you have an interdependency relationship. You will generally have an interdependency relationship with someone if:
 - you have a close personal relationship, and
 - you live together, and
 - one or both of you provide financial support for the other, and
 - one or both of you provide domestic support and personal care for the other.

You may also have an interdependency relationship with someone when you have a close personal relationship but do not satisfy the other criteria listed above by reason that one or both of you suffer from a physical, intellectual or psychiatric disability.

Your legal personal representative is the person:

- nominated by you to be the executor of your Will
- appointed to distribute your assets according to the laws of the relevant State or Territory (if you do not have a Will).



Please return completed form to TelstraSuper:

PO Box 14309, MELBOURNE VIC 8001 or email to contact@telstrasuper.com.au

Telstra Super Pty Ltd, ABN 86 007 422 522, AFSL 236709, is the trustee of the Telstra Superannuation Scheme ABN 85 502 108 833 (TelstraSuper).
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