Beneficiary nomination form



IMPORTANT INFORMATION - PLEASE READ BEFORE COMPLETING THIS FORM

Please note that if you are a **Vision Super Defined Benefit member**, you cannot nominate beneficiaries for your **Defined Benefit account**. In these cases, any benefit payable will be made to your estate.

Active Super Retirement Scheme and Active Super Defined Benefit members can make a binding or preferred nomination in favour of one or more dependants and/or legal personal representative(s), even if their account includes Defined Benefit components.

You can use this form to:

- Make a binding beneficiary nomination, which means Vision Super must pay your death benefit in accordance with your wishes (provided the nomination is valid at the time it is made)
- Revoke an existing beneficiary nomination
- Make a **preferred** beneficiary nomination, which means Vision Super will consider your wishes but can exercise its discretion about who to pay your death benefit to and how much each beneficiary receives.

Who can you nominate as a beneficiary?

You can nominate your dependants or your Estate.

You can nominate:

- 1. Your dependants as per the Superannuation Industry (Supervision) Act 1993:
 - a. Your spouse or partner whether you are married or not, a partner you live with in a genuine domestic relationship as a couple, including same-sex partners.
 - b. Your children, including adopted children and your spouse's/partner's children. If your children are over 18, there may be tax consequences of paying them a death benefit.
 - c. A person in an interdependent relationship with you, where you have a close personal relationship with each other, and you live together and provide each other with financial and/or domestic support and personal care. You may also have an interdependent relationship if you satisfy all of the other criteria, but do not live together because of a disability that requires one or both of you to live in a medical facility.
 - d. A person who is financially dependant on you
- 2. Your estate Vision Super will deal with the Legal Personal Representative, who is the person appointed to that role by being named as the executor in the Will or if there is no Will, by being appointed administrator of the estate by the Supreme Court.

How to make a binding beneficiary nomination

- Complete sections 1, 2, 3, 4, 5 and 6 of this form.
- You need two adults over the age of 18 to witness your hand signed signature. We do not accept digital signatures. The witnesses must see you sign the form and then sign the form themselves. They cannot be your beneficiaries.
- You will need to renew your binding nomination every three years from the date you sign it to keep it valid. You may also need to update your beneficiary nomination if your circumstances change for example, you get married or start living with a partner, have a child, or one of your beneficiaries is no longer dependant on you or dies.
- You can either post the original form back to Vision Super or upload a scanned copy or photo of the original form at visionsuper.com.au/upload-documents/

How to make a preferred beneficiary nomination

- Complete sections 1, 2, 3, 4 and 7 of this form.
- Preferred nominations are not binding on Vision Super, but they are an important consideration when Vision Super has to pay your benefit.

How to revoke a beneficiary nomination

You can revoke your beneficiary nomination at any time by completing a new Beneficiary nomination form.

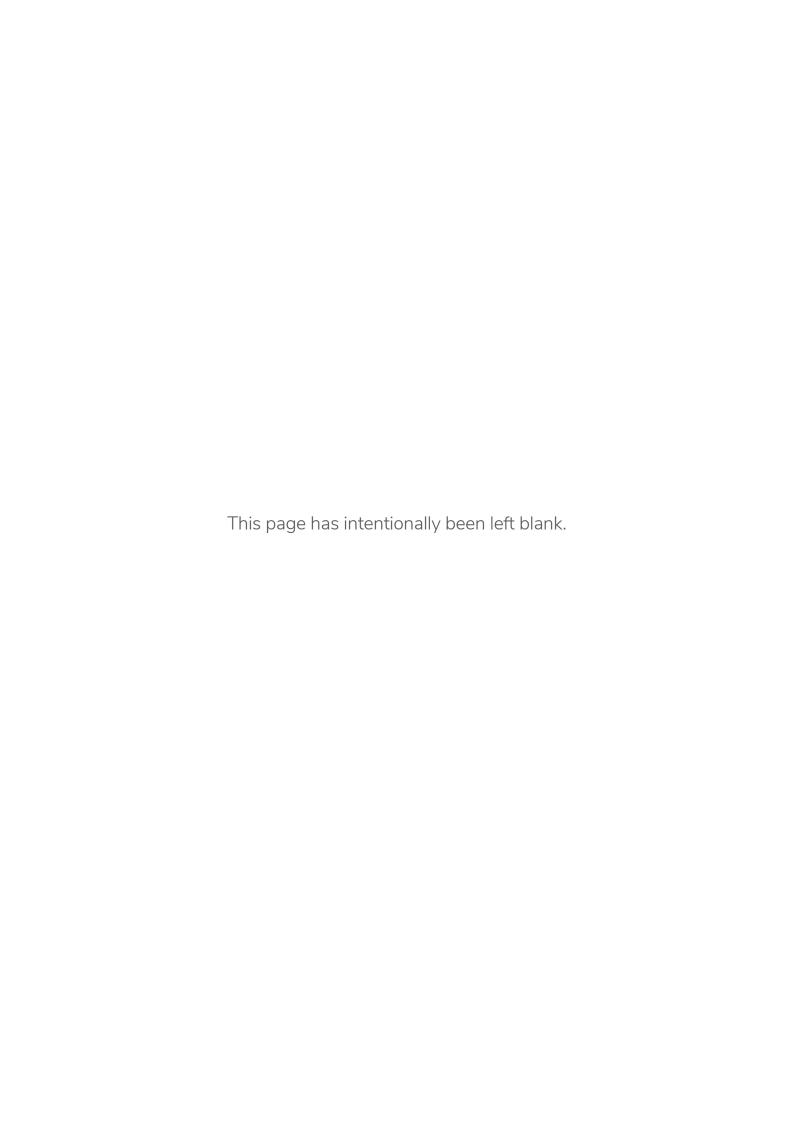
When will a binding nomination be invalid?

A binding nomination will normally become invalid or ineffective when one of the following happens:

- Three years have lapsed from the date the Binding nomination form was signed
- Any nominated beneficiary dies before you die
- Any nominated beneficiary is not a dependant at the time of your death. For example, if your spouse is nominated and you are divorced or your de facto relationship ended.

Also the trustee is not required to pay the death benefit in accordance with a valid and effective binding nomination in some circumstances including if:

- The trustee is subject to a court order and doing so would breach the court order, or
- The trustee is aware that the giving of, or failure to amend or revoke a nomination was a breach of a court order.



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Page 1 of 2 Binding and preferred beneficiary nominations are explained at visionsuper.com.au/super/beneficiaries/ 1. Personal details Member number: Ms Mrs Miss Mr Other Title: Mx Surname: Given name/s: Date of birth: Address: Suburb: State: Postcode: Contact email address: Contact phone number: Mobile number: 2. Account details* - Please select all account/s for which this nomination applies: Please use (🗸) to mark this box if you wish the binding nomination to apply to all accounts you hold with us as at the date of your death. OR If you prefer to make a nomination on specific accounts you hold with Vision Super, please list all account/s for which this nomination applies: * Please note that if you have a valid reversionary beneficiary nomination for your pension income stream, it will override your nomination of a binding or preferred nomination. 3. I want to make a: **Binding** beneficiary nomination (complete sections 4, 5 and 6) **OR Preferred** beneficiary nomination (complete sections 4 and 7) 4. Nomination details Full name **Relationship** (please tick one) Benefit % ☐ Spouse Address ☐ Child ☐ Interdependant relationship Date of birth Financial dependant Full name **Relationship** (please tick one) Benefit % ☐ Spouse Address ☐ Child ☐ Interdependant relationship Date of birth Financial dependant Full name **Relationship** (please tick one) Benefit % ☐ Spouse Address Child ☐ Interdependant relationship Date of birth ☐ Financial dependant Full name **Relationship** (please tick one) Benefit % ☐ Spouse Address Child

Should you wish to nominate additional beneficiaries please add them on a separate piece of paper and attach to this form.

TOTAL = 100% continued over

Benefit

☐ Interdependant relationship

☐ Financial dependant



Date of birth

My Estate

%

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5. Binding death beneficiary declaration

- . I understand that this nomination is binding and that the Trustee must pay my death benefit to my nominated dependants and/or to my Estate as specified on this form.
- 2. I understand that it is my responsibility to ensure my nomination remains valid and continues to reflect my wishes.
- 3. I understand that my nomination will be valid for three years from the date I sign this form.
- 4. I have read and understood the information on binding nominations in the relevant Product Disclosure Statement.

This information is collected for the sole purpose of managing and paying superannuation benefits and entitlements and will be protected in accordance with the *Privacy Act 1988* and Vision Super's privacy policy, which is available on request or on the Vision Super website.

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Signature:		Date^:		Must be the same date as witnesses' signature.
6. Witness declaration -	for Binding nominations o	nly		
I hereby declare that I am over the a	ige of 18 years. I am not a beneficiary noi	ninated on this form and I wit	nessed the member si	gn the binding nomination form
Signature of witness 1:	Printed name:		Date of birth:	Date*:
Signature of witness 2:	Printed name:		Date of birth:	
Death benefits from Vision Super Sterm allocated pension, Vision Sup	declaration is not binding on the Trustee and is a p Saver, Vision Personal Plan, Vision Partr per Account based pension (including T Transition to retirement pension and Ac	ner Plan, Vision ASŪ plan, Vis Three bucket pension), Vision	sion income streams, Super Non-commuta	able account based pension,
My dependants and/orMy estate				
The Trustee will determine in what	proportions (if any) your benefit is pai	d. Please refer to page 1 for v	who is considered a d	ependant.
	e sole purpose of managing and paying 1988 and Vision Super's privacy policy,			
Signature:				Date:

IMPORTANT: SEND YOUR COMPLETED FORM BACK TO US

Please post the original form to: Vision Super, PO Box 18041, Collins Street East, Melbourne VIC 8003 Or you can upload a scanned copy or photo of the original form at visionsuper.com.au/upload-documents/

Contact us				
Contact Centre: 1300 300 820	memberservices@visionsuper.com.au	visionsuper.com.au		