

Binding Death Benefit Nomination



Complete this form in **BLOCK LETTERS** and:

- post it to Asgard, PO Box 7490, Cloisters Square, Perth WA 6850
- we cannot accept faxes or photocopies of this form.

Note: Privacy laws protect your privacy. Read our Privacy Brochure for more information. A copy can be obtained from Investor Services.

Questions? Call Investor Services on 1800 998 185 or email asgard.investor.services@asgardwealthsolutions.com.au

OFFICE USE ONLY Client Relationship Centre

Information on completing this form

1. If you do not want to make a death benefit nomination that is binding on us and would prefer us to have discretion in relation to the payment of your superannuation benefit after death, you must use the Nominated Beneficiary section of the Application or an Account Amendment.
2. If you are a member of an Asgard Pension Account and would like to nominate your spouse to receive a reversionary pension after you die, you must use the Nominated Beneficiary section of the Application or an Account Amendment. You cannot use this form to make a reversionary pension nomination.
3. Unless you revoke it, this Binding Death Benefit Nomination will remain valid for a period of three years from the date you first signed it, or last confirmed or amended it. If a Binding Death Benefit Nomination ceases to be valid, it will not be binding on us and we will have discretion to determine to whom your death benefit is paid, although the Nomination will be taken into account.
4. This nomination is binding on us subject to conditions. You can only nominate an 'eligible dependant' or your estate and we will pay the death benefit in accordance with your nomination. If you nominate your estate, your death benefit will form part of your estate and will be distributable in accordance with your last valid Will or, if you do not have a valid Will, as the law provides. An eligible dependant is defined by superannuation law as:
 - your spouse (including a person who, although not legally married to you, lives with you on a genuine domestic basis as your husband or wife, as the case may be)
 - your child (including children such as adopted children and step-children, ex-nuptial children and adult children whether or not financially dependent on you, but not including grandchildren or nieces or nephews)
 - any person with whom you have an interdependency relationship
 - any other person financially dependent on you at the time of your death.For the purposes of superannuation law, subject to subsequent change by Regulation, two persons (whether or not related by family) have an interdependency relationship if:
 - a) They have a close personal relationship; and
 - b) They live together; and
 - c) One or each of them provides the other with financial support; and
 - d) One or each of them provides the other with domestic support and personal care.If two persons (whether or not related by family) satisfy (a) and they do not satisfy (b), (c) and (d) and the reason they do not satisfy the other requirements is that either or both of them suffer from a physical, intellectual or psychiatric disability, they will still have an interdependency relationship.
When nominating an eligible dependant, please use one of the following relationship descriptions: 'Spouse', 'Child', 'Interdependency' or 'Financial Dependand'.
5. If not renewed or revoked, a Binding Death Benefit Nomination expires after three years. Should your nomination expire and you wish to continue this form of nomination, you will need to submit a new Binding Death Benefit Nomination. You can change or revoke your nomination at any time.
6. We can only pay your death benefit to the eligible dependant(s) you nominate if that person is, or those persons are eligible dependant(s) at time of your death.
7. You can nominate more than one dependant, but you must specify the percentage of your death benefit each dependant is to receive.
8. You must sign and date this form in the presence of two witnesses. Each witness must have turned 18 years of age and neither of them can be a beneficiary named in section 2. Each witness must also sign and date the Declaration in section 4.
9. If you want to amend this nomination, you will need to complete and send a new Binding Death Benefit Nomination to us.
10. If you want to revoke this nomination, please ask us or your financial adviser for the required form (which must be witnessed in the same way described in point 8 above).

3. Declaration

Do not sign this declaration unless in the presence of both witnesses.

I have read the 'Information on completing this form' and understand that:

- in the event of my death, Asgard will pay my death benefit in accordance with this nomination
- this nomination revokes any previous nomination which I may have made
- unless I revoke it or amend it before it expires, this nomination will become invalid in three years time.

Signature

Date

4. Witnesses' declaration

We declare that:

- we have turned 18 years of age and we are not nominated beneficiaries in Section 2
- this nomination was signed by the Account holder in our presence.

Witness 1: Full name

Signature

Date

Witness 2: Full name

Signature

Date