

Binding death benefit nomination **Asgard**

New, Confirm or Revoke

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 relevant 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. Send the completed form to us via one of the following methods:

- > submit a copy via our secure Document Upload facility on Investor *Online* or AdviserNET (accessed from Forms > Document Upload menu)
- > post to Asgard, PO Box 7490, Cloisters Square WA 6850
- > email a copy to asgardforms@asgard.com.au

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

Questions? Call our Customer Relations team on 1800 998 185 Monday to Friday, between 8.30am and 7.00pm, Sydney time (8.00pm during daylight savings time) or email client.support@asgard.com.au

Privacy Statement

All personal information and credit-related information we collect about you is collected, used and disclosed by us in accordance with our Privacy Statement which is available at asgard.com.au/privacy or by calling us. Our Privacy Statement also provides information about how you can access and correct your personal information, and make a complaint. You do not have to provide us with any personal information or credit information but, if you don't, we may not be able to process your request.

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 benefit nomination will replace existing binding death benefit nomination. Your current nomination will be revoked upon acceptance of the new binding death benefit 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 step child or ex-nuptial child including adult children whether or not financial dependant on you),
 3. 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 relevant PDS for more information),
 4. 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 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

- > 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 benefit nomination. Your current nomination will be revoked upon acceptance of the new binding death benefit nomination.



- ☐ Ensure the total nomination allocated to your beneficiaries and/or estate equals 100% (otherwise the request will be invalid).
- ☐ Ensure 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.
- ☐ Ensure that the beneficiaries have not signed as witnesses.
- ☐ Ensure that your witnesses have signed and dated this form at the same time you signed the form.

Please indicate what you'd like to do by ticking (✓) the appropriate box below.

- ☐ **Make** a new binding nomination - complete sections 2, 3, 4 and 5.
- ☐ **Confirm** an existing binding nomination - complete sections 2 and 4.
- ☐ **Revoke** a current binding nomination - complete sections 2, 4 and 5.

Account type (tick one only)

☐ Super ☐ Pension

Account number

Date of birth

[illegible]

Account name

[illegible]

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

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

- i** Your total nomination must equal 100%
- i** Your request will be invalid if the total nomination (% of benefit) does not equal 100%

% of benefit

☐ **Dependant 1**

_____%

Full name

[illegible]

Relationship – please select one option only

☐ Spouse ☐ De-facto spouse ☐ Child* ☐ Interdependency relationship ☐ Financial dependant

☐ **Dependant 2**

□ □ %

Full name

[illegible]

Relationship – please select one option only

☐ Spouse ☐ De-facto spouse ☐ Child* ☐ Interdependency relationship ☐ Financial dependant

☐ **Dependant 3**

____%

Full name

[illegible]

Relationship – please select one option only

☐ Spouse ☐ De-facto spouse ☐ Child* ☐ Interdependency relationship ☐ Financial dependant



* As appears on birth certificate or driver licence

❶ If you are making or revoking a binding death benefit nomination, this form must be signed and dated in the presence of two witnesses.

I have read the information on completing this form and confirm my nomination indicated under section 1. Nomination details.

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i Your request will be invalid if all three dates 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.

[illegible]

1 2

[illegible]

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