

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:

- > ask your adviser to lodge it on your behalf on AdviserNET
- > 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 client.support@asgard.com.au
- > fax to (08) 9481 4834

If you submit online, email or fax, 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

Note: Privacy laws protect your privacy. Read our Privacy Policy for more information. A copy can be obtained from our website at www.asgard.com.au

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 nomination will replace existing binding death benefit nomination. Your current nomination will be revoked upon acceptance of the new binding death 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 nomination. Your current nomination will be revoked upon acceptance of the new binding death nomination.



Full name* of beneficiary

% of benefit

Dependant 4

%

Full name

Relationship – please select one option only

Spouse De-facto spouse Child* Interdependency relationship Financial dependant

and/or Estate

%

TOTAL 100%

* As appears on birth certificate or driver licence

i Ensure that you and your witnesses have signed and dated the declaration on the next page.

4. Investor declaration – mandatory

i 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 A nominated beneficiary cannot be a witness.

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

Signature

Date

5. Witnesses' declaration - mandatory when making or revoking a binding death benefit nomination

i Must be signed and dated at the same time the investor declaration is signed.

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.

Witness 1: Full name

Signature

Date

Witness 2: Full name

Signature

Date

Trustee

BT Funds Management Ltd
ABN 63 002 916 458, AFSL 233724

Custodian and Administrator

Asgard Capital Management Ltd
ABN 92 009 279 592
AFSL 240695

Customer Relations: 1800 998 185

PO Box 7490, Cloisters Square WA 6850

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