

# Superannuation

## Binding death benefit direction

Please use **BLACK** pen and **BLOCK** letters.

**!** You should read the current Product Disclosure Statement for the product in which your account is held as there may have been changes to the terms and conditions governing this transaction. The current Product Disclosure Statement is available on our website.

### Step 1. Provide member details

Client name	<input type="text"/>
Client number	<input type="text"/>
Account number	<input type="text"/>

### Step 2. Provide benefit payment instructions in the event of death

- I wish to make a new binding death benefit direction (please complete Steps 3, 4 & 5).
- !** The election to make a new binding death benefit direction will replace any existing binding death benefit direction or existing reversionary pensioner nomination currently recorded for the account in Step 1.
- I wish to revoke my binding death benefit direction and do not wish to replace it. I understand that in the event of my death my benefit will be paid to my legal personal representative (please complete Step 5 only).

### Step 3. Choose the type of direction

Non-lapsing      OR       Fixed term of  years

### Step 4. Nominate your dependants

Upon your death, Netwealth will pay your superannuation benefit to either your superannuation dependants under a binding death benefit direction or if you have not provided a binding death benefit direction it will be paid to your legal personal representative.

- !** To ensure that your direction is valid please ensure that:
- You have completed the % as either whole percentage or a maximum of 2 decimal places of the benefit for each of your nominated dependants and/or your legal personal representative;
  - The relationship of your nominated beneficiary is one of the relationships listed below;
  - The % of benefit for each of your nominated dependants and/or your legal personal representative add up to 100%; and
  - You are not nominated as a dependant below if you are completing this application under a Power of Attorney.

If this form is not completed correctly, your direction will not be considered binding on Netwealth and benefits will be paid to your legal personal representative.

Details of the dependants that you wish to nominate under your binding death benefit direction: (use copies of this form if nominating more than four)

Full name	<input type="text"/>	% of benefit	<input type="text"/>
Relationship	<input type="checkbox"/> Spouse/de facto <input type="checkbox"/> Child <input type="checkbox"/> Interdependent <input type="checkbox"/> Financial dependant		
Full name	<input type="text"/>	% of benefit	<input type="text"/>
Relationship	<input type="checkbox"/> Spouse/de facto <input type="checkbox"/> Child <input type="checkbox"/> Interdependent <input type="checkbox"/> Financial dependant		

Step 4. Nominate your dependants (continued)

Nominated dependants (continued)

Full name

Relationship  Spouse/de facto  Child  Interdependent  Financial dependant % of benefit

Full name

Relationship  Spouse/de facto  Child  Interdependent  Financial dependant % of benefit

Legal personal representative

Relationship  Legal personal representative % of benefit

Step 5. Read and sign this client declaration


By submitting this instruction, I represent to Netwealth that all the details in this transaction are true and correct and I declare that:

- 1. If I have given a binding death benefit direction, I accept and understand the conditions relating to binding death benefit directions;
- 2. I acknowledge that, where a fixed term direction has been elected, the direction will cease after the nominated fixed term unless I update it prior and, providing this binding death benefit direction is valid upon receipt by Netwealth, it will take effect on the date I signed this form;
- 3. I have received, read and understood and agree to be bound by the terms and conditions set out in the relevant Product Disclosure Statement for the Netwealth Superannuation Master Fund current as at the date I sign this form; and
- 4. I authorise Netwealth to disclose to my Nominated Financial Adviser (if applicable) information regarding this transaction and/or my investments held through the Netwealth Superannuation Master Fund.

Member

Signature

Date  /  /

 If you sign this form as a Power of Attorney and you are nominated as a dependant in Step 4, your direction will be invalid.

It is recommended that you retain a copy of the completed form for your own records.

This transaction is not available online and the offline transaction fee will not apply to this transaction.

Step 6. Once complete please send to us via our secure online document upload facility

Upload via your online account:  [Activities & Tasks > Document Upload](#)

For more information:  [netwealth.com.au](http://netwealth.com.au)

 1800 888 223

 Your adviser